NORTEL NETWORKS

# Enterprise Edge Attendant Console User Guide

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# Introduction to Enterprise Edge Attendant Console 1

Enterprise Edge Attendant Console is an application that provides centralized call management and call activity reporting capability to a business. Enterprise Edge Enterprise Edge Attendant Console runs on one or more Pentium®-class personal computers (PCs).

You can customize the way Enterprise Edge Attendant Console is set up to suit your company's call management requirements. A telephone attendant uses the graphical user interface to:

- originate calls
- answer and manage multiple calls
- view a company's name before answering the call
- record, add and change caller information for future use
- quickly access information about the caller
- transfer calls to employees or their voice message mailbox
- send the caller's name to the employee's Enterprise Edge telephone display
- park calls and page employees
- view information in a Directory about your company's employees such as their extension number, person status and telephone status
- create and print reports showing how incoming calls are handled
- view the status of all extensions in the company's Enterprise Edge Attendant Console system

## About this guide

This document describes how Enterprise Edge Enterprise Edge Attendant Console works and how to use it in your company. The instructions in this guide are intended for experienced PC users. The *Enterprise Edge Attendant Console User Guide* is organized as follows:

| | |
|---|---|
| 1. Introduction to Enterprise Edge Attendant Console | provides an overview of how this guide is organized, offers references and discusses using shortcut keys and right-click mouse capability. |
| 2. Understanding Enterprise Edge Attendant Console | explains how Enterprise Edge works and explains the features available with Enterprise Edge Attendant Console. |
| 3. Getting started | describes how to start, minimize, maximize and close the Attendant component and how to change the different Attendant setups. |
| 4. Working with the Attendant window | explains the components of the Enterprise Edge Attendant Console Attendant window. |
| 5. Handling calls | explains how an attendant answers and directs incoming calls and how a person being called answers and manages calls. |
| 6. Maintaining caller and employee information | describes how you enter, edit and maintain caller and employee information. |
| 7. Generating reports | explains how to use the Reports component to generate and customize reports. |
| Glossary | defines terms and acronyms used in this guide that are relevant to Enterprise Edge Attendant Console. |

## Conventions

### Naming of window components

Refer to Components of the Attendant window on page 25 for window terminology used in this document.

### Using the keyboard to navigate Enterprise Edge Attendant Console

You can use the keyboard to do many tasks quickly in Enterprise Edge Attendant Console. There are three kinds of keyboard navigation. The first two types are Windows standard while the third type is particular to Enterprise Edge Attendant Console. They are:

- Access keys, which are the letters underlined in menu names and commands. For more information, refer to Access keys on page 9.
- shortcut keys defined on the menus. For more information, refer to Shortcut keys defined on the menus on page 9.
- commands initiated by pressing the Alt key and another key. For more information, refer to Commands initiated by holding down the Alt key and an additional key on page 9.

### Access keys

In Enterprise Edge Attendant Console, each menu name and each command in the menu has an underlined letter called an Access key.

To use the Access keys:

1. Press the **Alt** key.
   This gives you access to the menu names in the menu bar.

2. Press the Access key for the menu name. For example, to open the Edit menu, press **Alt** then **E** and the Edit menu is displayed.

3. Press the Access key for the desired command. For example, to select Caller Information from the Edit menu, press **I** and the Edit Caller Information dialog box appears.

### Shortcut keys defined on the menus

Shortcut key combinations are shown beside some menu commands. When you use the Ctrl key with another key, hold the Ctrl key down while pressing the second key in the combination. The additional shortcut keys are:

In the Edit menu:

| | |
|---|---|
| Cut | Ctrl+X |
| Copy | Ctrl+C |
| Paste | Ctrl+V |
| Dial Paste | Ctrl+D |
| Transfer Paste | Ctrl+T |

In the Transfer menu:

| | |
|---|---|
| 1st Contact | F9 |
| 2nd Contact | F10 |
| 3rd Contact | F11 |
| Transfer to Target | Num Pad+ |
| Screen Transfer | Ctrl Num Pad+ |

In the Caller menu:

| | |
|---|---|
| Answer Next | Esc |
| Hold | Ctrl+H |
| Release | F12 |

### Commands initiated by holding down the Alt key and an additional key

You can access Call handling functions directly from the Attendant window by pressing the Alt key and the underlined keys in the commands. You must hold down the Alt key while you press other key. For example, to place an active call on Hold, hold down the **Alt** key and press **H**.

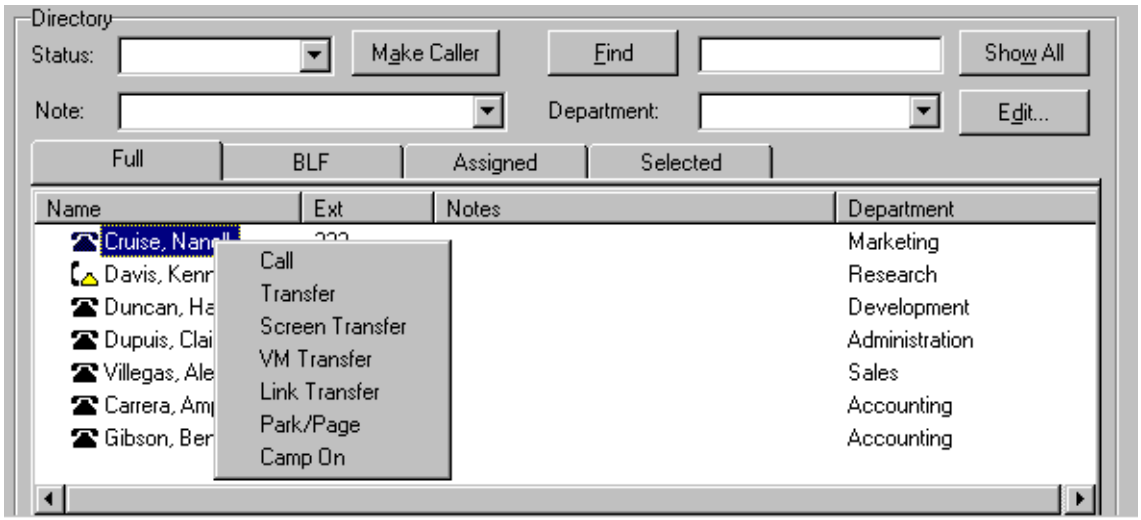
## Processing a call with right-click capability

Right-click capability helps you process calls faster by minimizing mouse movement. You can use right-click capability for these call processing options:

- originate a call
- transfer a call
- screened transfer
- transfer a call to voice message mailbox
- link transfer
- park a call and page an employee
- camp a call on an extension

To use right-click capability:

1. Click a name or extension in the **Directory** list and right-click the mouse. A list of call processing commands appears.




2. Click one of the call processing commands.

## References

As an Enterprise Edge attendant, you can refer to the *Enterprise Edge Attendant Console Set Up and Operation Guide* for more information about Enterprise Edge Attendant Console.

# Understanding Enterprise Edge Attendant Console 2

Enterprise Edge Attendant Console is a client/Enterprise Edge server software application that consists of the following three interrelated components:

- Server component. Refer to Server component on page 11
- Attendant component. Refer to Attendant component on page 11
- Reports component. Refer to Reports component on page 12

## Server component

The Server component communicates with your Enterprise Edge server initiating Enterprise Edge telephone functions such as transferring calls, placing calls on hold and parking calls.

The Server component communicates with one or more Attendant components. An Attendant component can be either on the same PC as the one with the Server component or on a separate PC connected via a Local Area Network (LAN).

The Server component receives:

- notification of all incoming calls
- status changes of all telephones attached to the Enterprise Edge server

The Server component collects and manages call-processing information in a database that can be used for reporting purposes.

## Attendant component

The Attendant component has an easy-to-use graphical user interface. The Attendant window displays information about incoming callers and includes a Company Directory with employee names, telephone status (such as On-hook, Off-hook, Do Not Disturb and Call Forward) and personal status (None, Not at desk and Out of office). The Directory can be searched from the Attendant window.

Attendant PCs can be either main, assistant, overflow or backup. For more information, refer to Types of attendant setups on page 17. Incoming calls can be transferred to an extension, a voice message mailbox or an external number.

You can set up more than one attendant your company with . You can also set up Enterprise Edge Attendant Console to provide call coverage for assigned groups of employees. In this setup, you are notified of calls to assigned employees and can answer calls when the employees cannot.

## Reports component

The Reports component provides information about incoming calls to your company. Reports can help you identify trends and find answers to questions before they become problems. You can request a report from any PC with an Attendant component and view the report in the Reports window or print it on an attached printer.

## Enterprise Edge Attendant Console features

There are many features and benefits associated with Enterprise Edge Attendant Console.

### Easy to use, time saving Graphical User Interface (GUI)

Enterprise Edge Attendant Console has a GUI that is uncomplicated compared with other attendant consoles, without sacrificing sophisticated features. You can easily select the correct buttons to process incoming calls. Very few key strokes are required for most everyday activities. For example, answering an incoming call and transferring it to an extension usually requires only two steps: clicking a Loop button to answer the call and double-clicking the icon beside the called party's name to transfer the call.

The GUI provides you with at-a-glance information about the progress and status of calls. Even before a call is answered, you are provided with advance information about the call and caller, including the caller's telephone number and the length of time that the caller is waiting. If calls transfer back to you, the Attendant window immediately displays the status of the call.

The readily available on-line help ensures that Enterprise Edge Attendant Console is easy to learn and to use.

Because performing normal attendant functions is faster with a GUI, you can do other tasks.

### Advanced software capabilities

Here are some of Enterprise Edge Attendant Console's advanced software capabilities:

| | |
|---|---|
| Visual call announcing and control | Even when a telephone is busy with a call, an attendant can send caller information to the telephone's two-line display area. Using display buttons, the person called can control the call accordingly. This means that important calls are not lost. |
| Backup attendant | Incoming calls can be quickly and easily transferred to a backup attendant sitting at a different location than the main attendant. This means that the backup attendant does not have to leave their desk to cover for the main attendant. |
| Overflow attendant | Overflow calls are transferred to an overflow attendant. Consequently, calls are not lost during busy periods. |

| | |
|---|---|
| Reports | Enterprise Edge Attendant Console gives you reports that help you obtain information such as the number of incoming calls and who answers the calls. This information shows the calling trends in the business and the performance of the telephone system. |
| Ability to handle growth | A one-time purchase of Enterprise Edge Attendant Console is often all that is needed. If you want to add more attendant positions as the company grows, Enterprise Edge Attendant Console is easily expandable. |

### Attractiveness of PC compatibility

Enterprise Edge Attendant Console combines telecommunications with personal computing to make the attendant's job easier, faster and more efficient.

| | |
|---|---|
| Use of existing hardware | There is no need for you to purchase additional dedicated hardware to obtain the power of Enterprise Edge Attendant Console. If you have the minimum computer requirements, all you need is the software and a hardware enabler that allows your computer to communicate with the Enterprise Edge server. |
| Multi-tasking | Enterprise Edge Attendant Console works in a multi-tasking environment. You can use your PC for other tasks such as word processing in addition to attending to calls. You can quickly switch from PC tasks to the Attendant window if there is an incoming call. |

## Attendant types

Each PC that has the Attendant component installed is set up to handle calls either as a main attendant, overflow attendant, backup attendant or assistant attendant. Each attendant type gives you flexibility in responding to calls. This ensures that all calls can be handled in a professional and timely manner. For detailed information about attendant setups, refer to Types of attendant setups on page 17.

# Getting started 3

After your Enterprise Edge Attendant Console system is set up and checked by the installer or System Administrator, you can use the Enterprise Edge Attendant Console components. Before you handle calls, make sure you know how to start and quit Enterprise Edge Attendant Console on your PC. For information on starting the components for the first time, refer to Initializing and configuring the Attendant component on page 16.

## Starting the Attendant component

For information about changing the Attendant window settings refer to Initializing and configuring the Attendant component on page 16.

To start the Attendant component and open the Enterprise Edge Attendant Console Attendant window:

1. On the Attendant PC, click **Start** and point to **Programs**, point to **Nortel Networks**, point to **Attendant Console** and then click **Attendant**.
   The Enterprise Edge Attendant Console Attendant taskbar button appears on the taskbar. The Enterprise Edge Attendant Console Attendant window appears with the Tip of the Day window over it.

2. On the **Tip of the Day** window click the **Close** button.

## Minimizing and maximizing the Attendant window

You can minimize and maximize the Attendant window depending on your needs.

To minimize the Attendant window:

1. In the title bar click **Minimize** . The Attendant window minimizes.

To maximize the Attendant window:

1. On the taskbar, click the **Enterprise Edge Attendant Console Attendant** taskbar button.
   The Attendant window returns to regular size.

## Quitting the Attendant component

To quit the Attendant component:

1. On the **File** menu click **Exit**
   or
   on the title bar click the **Close** box.
   A message appears asking if you want to quit Enterprise Edge Attendant Console.

2. Click the **Yes** button.

You can also shut down the Attendant component from the Windows taskbar by right-clicking the **Enterprise Edge Attendant Console Attendant** taskbar button and clicking the **Close** button.

## Initializing and configuring the Attendant component

Each PC that has the Attendant component installed must be set up to handle calls either as a full-time main attendant, part-time main attendant, backup attendant, overflow attendant or assistant attendant.

### Starting the Attendant component for the first time

To start and set up the Attendant component:

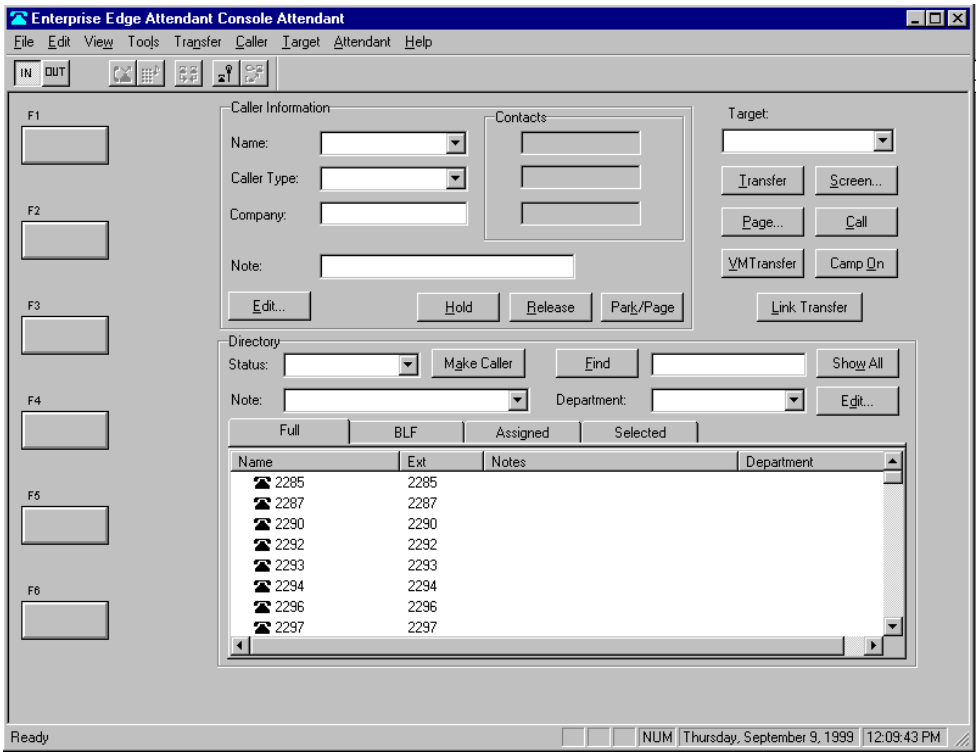
1. On the taskbar, click **Start**, point to **Programs**, point to **Enterprise Edge Attendant Console** and click **Attendant**.
   The Attendant component starts. The first time the Attendant component is started after installation, the Enter Attendant Options dialog box appears.

2. In the **Attendant Extension** box type the extension number of the attendant.

3. If the network has more than one Enterprise Edge Attendant Console Server running, you must enter the Server ID for the Enterprise Edge server you want to use in the **Server ID** box.
   The Server ID refers to the Windows TCP/IP host name of the Server PC. For information about how to determine the Server ID, refer to Determining the TCP/IP host name of a Server PC in the *Enterprise Edge Attendant Console Installation Guide*. If there is only one Enterprise Edge Attendant Console Server running, leave this box blank and the Attendant component automatically connects to that Server component.

4. Click the **OK** button.
   The Tip of the Day dialog box appears over the Enterprise Edge Attendant Console Attendant window.

5. Click the **Close** button to see the Enterprise Edge Attendant Console Attendant window.




When the setup is complete, the Directory list displays the Enterprise Edge extensions connected to the Enterprise Edge server.

## Types of attendant setups

Each PC that has the Attendant component installed must be set up to handle calls either as a main attendant, overflow attendant, backup attendant or assistant attendant.

### Full-time main attendant setup

The full-time main attendant setup is intended for a telephone operator that has the Attendant window always visible on their PC. There can be more than one full-time attendant.

Every Attendant component must have the Server ID and Attendant extension options set correctly for the Attendant component to function. The Server ID indicates to the Attendant component where the Server component is located. The Attendant extension setting indicates to the Attendant component which Enterprise Edge telephone belongs to the attendant.

The Attendant component displays all incoming calls to the attendant's telephone as a yellow Ringing Loop button on the Attendant window. If the attendant's telephone is programmed to receive all the incoming calls for the company, (that is as a main attendant) Enterprise Edge Attendant Console Attendant displays those calls.

Before the attendant can receive and make calls, you must set the attendant's extension number through the Attendant component. The extension must be a valid extension on the Enterprise Edge system and must be the telephone at the attendant's desk.

To set or change the attendant's extension number:

1. On the **Tools** menu click **Options**.
   The Options dialog box appears with the Options tab open.

2. In the **Attendant** option, in the **My Extension** box, type the extension number of the attendant's telephone.

3. Click the **OK** button.

#### Part-time main attendant setup

The part-time main attendant can answer incoming calls and performs tasks on the PC such as word processing.

The difference between the full-time main attendant setup and the part-time main attendant setup is that the part-time setup has additional Attendant options selected that allow notification of incoming calls when the attendant component is minimized. Refer to Full-time main attendant setup on page 17 and Setting up other attendant features on page 21.

#### Backup attendant setup

A backup attendant is an attendant position that receives calls that are redirected from another attendant position. The backup attendant can at the same time operate as a main attendant, assistant attendant, or any combination of the attendant types.

Each Attendant PC that is set up to receive incoming calls must be set up to redirect the calls to the backup Attendant PC.

**Note:** Calls can be redirected to another Enterprise Edge Attendant Console attendant or any Enterprise Edge extension in the company.

If the attendant needs to leave their position, they can activate the backup attendant position by clicking the Out button on the Attendant window. The Out button diverts calls to the backup attendant. After clicking the Out button, the attendant can complete the calls currently in progress on the Attendant window. New calls appear on the absent main attendant's PC and also appear on the backup attendant's PC. Although the main attendant is out, the Attendant component can still process calls, if required.

To set up the backup attendant:

1. On the **Tools** menu click **Options**.
   The Options dialog box appears with the Options tab open.

1. In the **Redirect calls to** option in the **Extension** box, type the backup attendant's extension number.

2. Click the **OK** button.

The main attendant can redirect their calls to the backup attendant by clicking the Out button. The main attendant can click the In button to resume receiving calls at their PC.

#### Overflow attendant setup

An overflow attendant receives calls that are redirected from another attendant position where there are more incoming calls than Loop buttons. For example, if a main attendant is already handling six incoming calls, the next call is redirected to the overflow attendant until one of the main attendant's six Loop buttons is available.

The overflow attendant can also operate as a main attendant, an assistant attendant or any combination of the attendant types.

After you set up an Attendant PC as the overflow, each Attendant PC that is set up to receive incoming calls must be set up to redirect calls to the overflow Attendant PC whenever overflow conditions exist. You must activate the overflow feature at each Attendant PC.

**Note:** Calls can be redirected to another Enterprise Edge Attendant Console attendant or any Enterprise Edge extension.

If all the Loop buttons are in use, the Loop overflow icon appears in the Attendant Status Bar and the overflow call goes to the specified extension. For more information on the Loop overflow icon, see Status Bar on page 27.

To set the overflow extension:

1. On the **Tools** menu, click **Options**.
   The Options dialog box appears with the Options tab open.

2. In the **Redirect calls to** option, in the **Extension** box, type the overflow attendant's extension number.

3. Select **Call overflow occurs** to redirect calls when all of the main attendant's Loop buttons are busy with calls.

4. Click the **OK** button.

#### Assistant attendant setup

An assistant attendant provides call coverage for one or more extensions in the system. You can set up an assistant attendant to monitor incoming calls to specific extensions. Set up an assistant attendant if an employee wants an assistant attendant, such as an administrative assistant, to answer the employees' calls.

To set up an assistant attendant:

1. On the **Tools** menu, click **Options**.
   The Options dialog box appears with the Options tab open.

2. In the **My extensio**n box, type the assistant attendant's extension.

3. Click the **OK** button.

To add or remove an assistant attendant's assigned extensions:

1. On the **Tools** menu, click **Options**.
   The Options dialog box appears with the Options tab open.

2. Click the **Assigned** tab.

   To add an extension, click the extension you want in the **All extensions** box and click >> to copy it to the **Assigned extensions** list.

   To remove an extension from the Assigned extensions list, click the extension number in the **Assigned extensions** list and click <<.

To view an assistant attendant's assigned extensions:

1. On the **Tools** menu, click **Options**.
   The Options dialog box appears with the Options tab open.

2. Click the **Assigned** tab.

3. After you view the extensions, click the **OK** button.

## Setting up other attendant features

### Call notification

There are two ways Enterprise Edge Attendant Console can notify an attendant of incoming calls:

- If an attendant keeps the Attendant window minimized and works on other tasks, they are notified of incoming calls with a Call Notification dialog box. The attendant can answer the call by clicking **Take** on the dialog box or ignore the call and let another attendant answer it.
- If the Attendant window is not minimized, the attendant is notified of an incoming call by Ringing Loop button.

To activate call notification:

1. On the **Tools** menu click **Options**.
   The Options dialog box appears.

2. In the **Pop "Call Notification" dialog box when** list, click either check box:

   **Assigned extension rings** - The attendant is notified of calls to the assigned extensions.

   or

   **My extension rings** -The attendant is notified when their own extension has an incoming call.

   If both check boxes are clear, the attendant is not notified of calls when the window is minimized.

3. Click the **OK** button.

When an outside call arrives for an assigned extension, a Call Notification dialog box appears to inform the assistant attendant of the call. Internal calls from an extension to an assigned extension are not displayed on the assistant attendant's window.

#### Automatically restoring the Attendant window when a call comes in

Part-time attendants can have the Attendant window minimized or under another window. The attendant can restore the Attendant window from the taskbar by clicking the **Enterprise Edge Attendant Console Attendant** taskbar button. A quicker method is to set the Attendant window to restore automatically.

The Attendant component can automatically restore the window when the attendant's extension goes off-hook ("active").

To set the Attendant window to restore automatically:

1. On the **Tools** menu click **Options**.
   The Options dialog box appears with the Options tab open.

2. In the **Restore minimized Attendant screen when** option, click the **Call Answered on Attendant extension** check box.

3. Click the **OK** button.

When an outside call arrives for an assigned extension, a Call Notification dialog box appears to inform the assistant attendant of the call. Internal calls from an extension to an assigned extension are not displayed on the assistant attendant's window.

#### Setting the Attendant Selected option

The Selected tab lets the attendant can view a selected subset of the full directory. This is useful if the attendant's incoming calls are directed to a limited number of extensions.

To display selected extensions in the Directory list of the Attendant window:

1. On the **Tools** menu click **Options**.
   The Options dialog box appears with the Options tab open.

2. Click the **Selected** tab.

3. To add an extension, click the extension you want in the **All extensions** list and click >> to copy it to the **Selected extensions** list.

   To remove an extension from the Selected extensions list, click the extension number in the **Selected extensions** list and click <<.

4. Click the **OK** button.

### Setting Transfer options for the voice message mailbox and linking

If your Enterprise Edge server is not connected to a Centrex switch or is not connected to Enterprise Edge Voice Messaging, you can disable the Link Transfer or VM Transfer buttons on the Attendant window.

To disable the Transfer Options:

1. On the **Tools** menu click **Options**.
   The Options dialog box appears with the Options tab open.
   The Transfer Options are in the bottom right of the dialog box.

2. Select the **Disable VM Transfer** check box to disable the VM Transfer button
   or
   select the **Disable Link Transfer** check box to make disable the Link Transfer button.

If they are disabled the buttons appear dimmed on the Attendant window. You can re-enable the buttons by clearing the check mark from the appropriate check box.

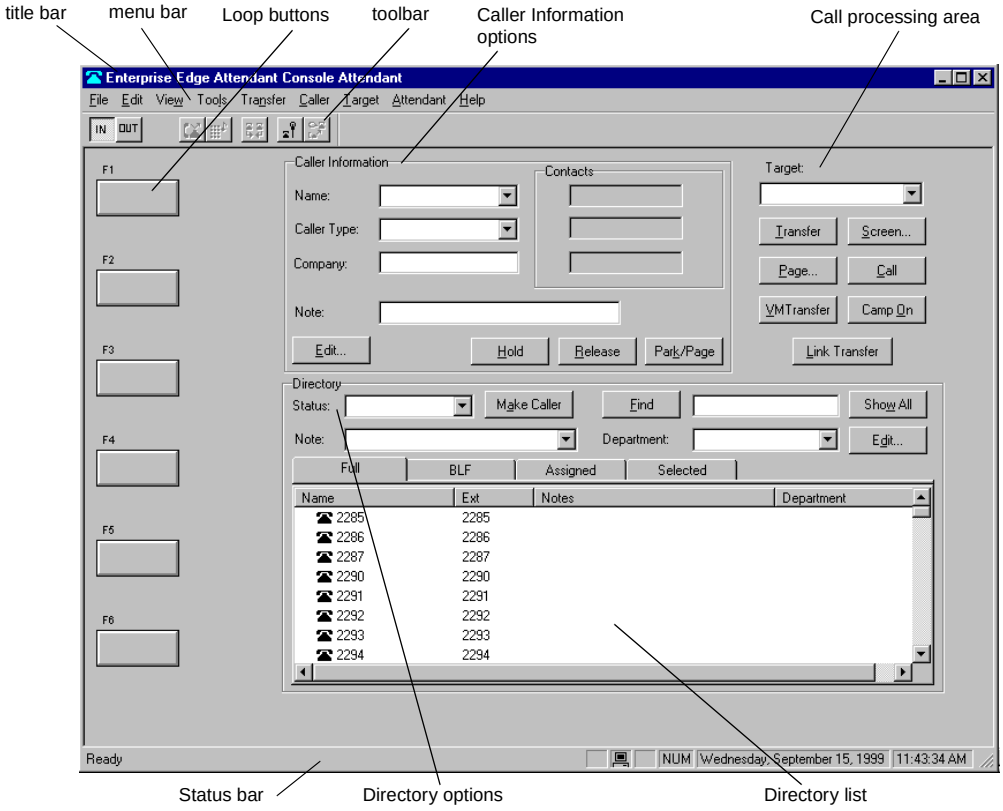
# Using the Attendant window

# 4

This section explains how to use the buttons and options on the Enterprise Edge Attendant Console Attendant window with the mouse and the keyboard.

## Components of the Attendant window

The Enterprise Edge Attendant Console Attendant window contains:




**Components of the Attendant window**

### Title bar

The title bar is at the top of the Attendant window. The program icon that appears on the left side of the title bar when clicked contains: Restore, Move, Size, Minimize, Maximize, and Close. The telephone icon and the program title, Enterprise Edge Attendant Console Attendant is displayed. On the right side are the Windows standard Minimize, Maximize and Close buttons.

### Menu bar

The menu bar is under the title bar and contains the File, Edit, View, Tools, Transfer, Caller, Target, Attendant and Help menus. Use these menus to access Attendant functions.

### Toolbar

The toolbar is under the menu bar and contains several buttons that provide quick and easy access to some Enterprise Edge Attendant Console functions.

### Loop buttons

The Loop buttons on the left of the Attendant window are labeled F1, F2 and so on, and are used to answer calls. Each Loop button can handle a single call. The Loop button has a color and a word that represents its type of call activity. For example, a yellow Loop button with the word Ringing represents an incoming call at the attendant's extension. For information on how to hide or display the Loop buttons except for those that indicate call activity refer to View menu on page 29.

### Caller Information options

The Caller Information options is in the top center of the Attendant window and displays information about the caller that is stored in the Enterprise Edge server database.

### Call processing area

Use the Target list box and the Call Processing buttons at the top right of the Attendant window to make and transfer calls.

## Directory list

The Directory list is at the bottom of the Attendant window and has three sections:

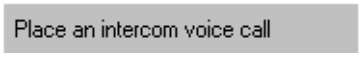
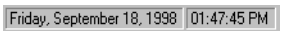
| | |
|---|---|
| Directory list | displays the Name, Extension, Notes and Department of extensions. From the directory list you can select a name and number to appear in the Target list box. The Directory list also shows the telephone status icon and the person status icon for extensions. |
| Note and Status list boxes | let you change the status of the employee and include a note for an extension. |
| Find and Department boxes<br>Show All and Edit buttons | search for extensions and edit employee information and extension records. |

## Status Bar

To display the Status Bar:

1. Click **View** and then click **Status Bar**.

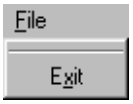
The Status Bar contains:

| | |
|---|---|
|  | Displays the functions of the toolbar button when you point at it. |
| | The Loop Overflow icon appears if there are more calls waiting to be answered than available Loop buttons. |
| | Appears if the Num Lock key is on. |
|  | Shows date and time. |

## Using the menu bar

The menu bar contains the menus on the Enterprise Edge Attendant Console Attendant window. Help tips appear in the Status bar at the bottom of the Attendant window if you move the mouse pointer over the commands in the menu.

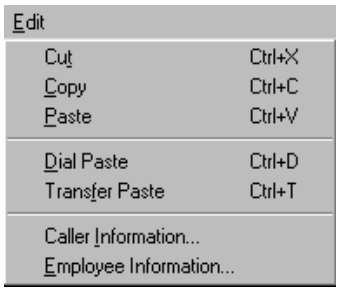
### File menu




The File menu contains:

| | |
|---|---|
| Exit | closes the Attendant component. |

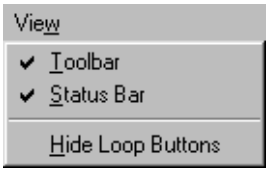
### Edit menu




The Edit menu contains:

| | |
|---|---|
| Cut | cuts selected text from an editable box and moves it to the Clipboard. |
| Copy | copies a selection of text from an editable box and moves it to the Clipboard. |
| Paste | inserts the Clipboard contents at the insertion point. |
| Dial Paste | dials the number in the Clipboard. The number can include special characters such as hyphen, parenthesis, space or period.<br><br>**Note**: The Clipboard contents are added to any characters already in the Target list box. This allows you to type a routing code in the Target list box first and then click the Dial Paste button. |
| Transfer Paste | transfers a call to the number in the Clipboard. |
| Caller Information | opens the Edit Caller Information dialog box. The Edit button in the Caller Information list performs the same function. Refer to The Edit Caller Information dialog box on page 36 and Maintaining caller information on page 63. |
| Employee Information | opens the Edit Employee Information dialog box. The Edit button in the Directory list performs the same function. Refer to The Edit Employee Information dialog box on page 40 and Maintaining employee information on page 67. |

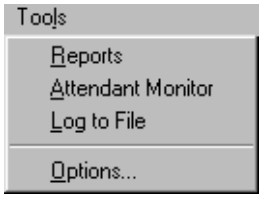
## View menu




The View menu contains:

| | |
|---|---|
| Toolbar | shows/hides the toolbar. |
| Status Bar | shows/hides the Status Bar. |
| Hide Loop Buttons | shows/hides the inactive Loop buttons. When selected, only active Loop buttons appear on the Attendant window. |

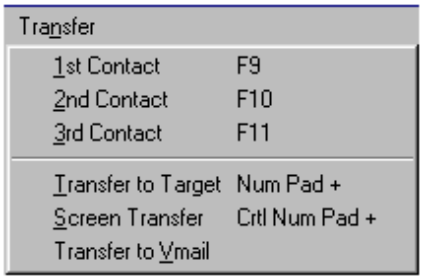
## Tools menu




The Tools menu contains:

| | |
|---|---|
| Reports | starts the Reports component. |
| Attendant Monitor | opens the Attendant Monitor dialog box that displays diagnostic information sent by the Attendant component and received back from the Server component. The Attendant Monitor helps in troubleshooting. |
| Log to File | writes Attendant component activity and Server messaging to a log file. This is used for troubleshooting. |
| Options | opens the Options dialog box, which has three tabs.<br><br>The Options tab:<br>lets you specify the Server ID, enter the Attendant extension, set the conditions for making the Enterprise Edge Attendant Console Attendant window appear, and set call redirection.<br><br>The Assigned tab:<br>lets you choose extensions to appear in the Assigned tab contained in the Directory list on the Attendant window.<br>The Selected tab:<br>lets you choose extensions to appear in the Selected tab contained in the Directory list of the Attendant window.<br><br>For more information, refer to Using the Directory options on page 38. |

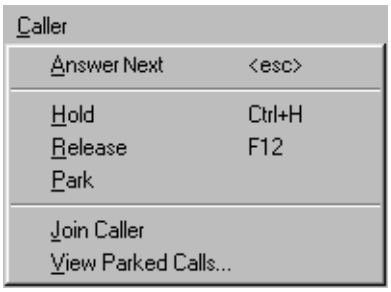
### Transfer menu




The Transfer menu contains:

| | |
|---|---|
| 1st Contact | transfers the active call to the caller's first contact.<br>1st Contact is enabled if there is an active call and a contact displayed in the first box of the Contacts list. |
| 2nd Contact | transfers the active call to the caller's second contact.<br>2nd Contact is enabled if there is an active call and a contact displayed in the second box of the Contacts list. |
| 3rd Contact | transfers the active call to the caller's third contact.<br>3rd Contact is enabled if there is an active call and a contact displayed in the third box of the Contacts list. |
| Transfer to Target | transfers the active call to the extension in the Target list box. The Transfer button performs the same function. |
| Screen Transfer | screens a call transfer of an active call to the extension number in the Target list box. The caller is automatically put on hold when you click Screen Transfer. The caller is connected when you click Transfer Now in the Screen Transfer dialog box. The Screen button performs the same function.<br>Refer to Parking, holding and screening calls on page 51. |
| Transfer to VMail | transfers the active call to the voice message mailbox of the extension in the Target list box. The VMTransfer button performs the same function. |

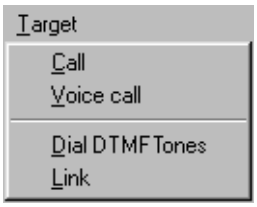
## Caller menu




The Caller menu contains:

| | |
|---|---|
| Answer Next | answers the next call in the queue. |
| Hold | places an active call on hold. The Hold button performs the same function. Refer to Parking, holding and screening calls on page 51. |
| Release | disconnects the active call. The Release button performs the same function. |
| Park | parks the active call so you can page the person whose extension is in the Target list box. A list of all parked calls appears in the Parked Calls dialog box when you click View Parked Calls on the Caller menu. You can retrieve the call from the View Parked Calls dialog box by pressing the Retrieve button. For more information on viewing parked calls, refer to Parking, holding and screening calls on page 51. The Park/Page button performs the same function. |
| Join Caller | connects two callers by joining the active call with the call that is on hold. Refer to Linking and Joining calls on page 56. |
| View Parked Calls | opens the Parked Calls dialog box, which displays calls parked by all attendants. A call can be retrieved by any attendant or from any telephone on the Enterprise Edge server. For more information, refer to Parking, holding and screening calls on page 51. |

### Target menu




The Target menu contains:

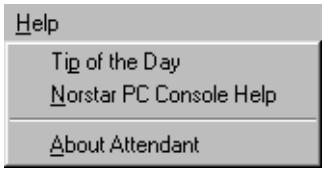
| | |
|---|---|
| Call | initiates a call from the attendant extension to the number in the Target list box. The Call button performs the same function. |
| Voice Call | places a voice call from the Attendant to the extension in the Target list box. For more information, refer to Contacting employees using Voice Call on page 55. |
| Dial DTMF Tones | dials DTMF-tone digits to the external number in the Target list box. This must be used in conjunction with the Link button and with outdialing on an active line to access other systems or carriers (for example, Centrex). |
| Link | accesses (hookflash) Centrex/CO line features (such as off-premise transfer or conference) or other systems or carriers while on an incoming call. Clicking the Link button while on an incoming call places the caller on hold and generates a Link signal (also called flash or recall) on the active line. The DTMF button is used with the Link button to outdial the digits in the Target list box. For more information, refer to Linking and Joining calls on page 56. |

### Attendant menu

The Attendant menu contains:

| | |
|---|---|
| In | toggles with the Out command. When set to In, the attendant is in position to take calls. |
| Out | toggles with the In command. When set to Out, the attendant is not in position to take calls. All calls that ring at the attendant's telephone are forwarded to the backup attendant position.<br><br>**Note**: To redirect calls to a backup extension, on the Tools menu click Options. Set redirect options on the Options dialog box. |

### Help menu




The Help menu contains:

| | |
|---|---|
| Tip of the Day | shows or hides the Tip of the Day window when Attendant starts. |
| Attendant Help | displays Help files. |
| About Attendant | displays program information, revision number, copyright information, and system information. |

## Using the toolbar

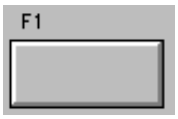
The toolbar contains several buttons that provide quick and easy access to some of the Enterprise Edge Attendant Console functions.

To display the toolbar:

1. Click the **View** menu and then click **Toolbar**.
   The toolbar is displayed across the top of the Attendant window below the menu bar.

The toolbar buttons are:

| | |
|---|---|
| | Use the In and Out buttons to indicate whether or not you can take calls. |
| | Use the Link button to access Centrex/CO line features (such as off-premise transfer or conference) or other systems or carriers while on an outside call. For more information, refer to Linking and Joining calls on page 56. |
| | Use the DTMF button to dial DTMF-tone digits to the external number in the Target list box. This must be used in conjunction with the Link button and with outdialing on an active line to access other systems or carriers such as Centrex. This button also sends special characters (for example, *, #) from the Target list box to other services such as Interactive Voice Response (IVR) and Enterprise Edge messaging services. |
| | Use the Join button to connect two callers by joining the active call with the call that is on hold at the Enterprise Edge Attendant Console. Refer to Linking and Joining calls on page 56. |

| | |
|---|---|
| | Use the View Parked button to display the Parked dialog box, which lists any parked calls. Calls can be parked and retrieved from any Enterprise Edge telephone connected to your Enterprise Edge server. Refer to Parking calls and paging employees on page 51. |
| | Use the Voice Call to initiate a call from the attendant's telephone to the speaker of another telephone without first causing the telephone to ring. Refer to Parking calls and paging employees on page 51. |
|  | Six Loop buttons, labeled F1 to F6, are on the left side of the Attendant window and are used to answer calls. Each Loop button represents call. The color of the Loop button and the displayed word shows the type of call activity occurring.<br><br>You can display or hide Loop buttons, depending on your preference. On the **View** menu click **Hide Loop Buttons**. When a check mark appears, only active Loop buttons appear. When Hide Loop Buttons is not selected, all the Loop buttons appear. |

Words and colors on Loop buttons:

| | |
|---|---|
| | The word Ringing appears on a yellow Loop button when an incoming call rings at the attendant's extension. |
| | A green Loop button with the word Active appears when a call is answered by the attendant. Only one Loop button is active at one time. |
| | A blue Loop button with the words On Hold appears when a call is on hold at the attendant's extension. |
| | An orange Loop button with the word Callback appears when a call returns to the attendant from the Target extension. |
| | A red Loop button with the word Ringing appears when a call rings at an Assigned extension. |
| | Grey Loop buttons appear when the Loop button is inactive and when Hide Loop Buttons is not selected. |

## Using Caller Information options

Caller Information options are in the top, center of the Attendant window. Caller Information options contain information about the caller that appears in the boxes when you answer a call.

Caller Information options include:

- Name, Caller Type list boxes (Unclassified, Personal, Employee, Vendor, or Customer), Company and Note boxes
- Contacts boxes that display the three parties the caller most frequently calls in your company

The following buttons appear in the Caller Information options:

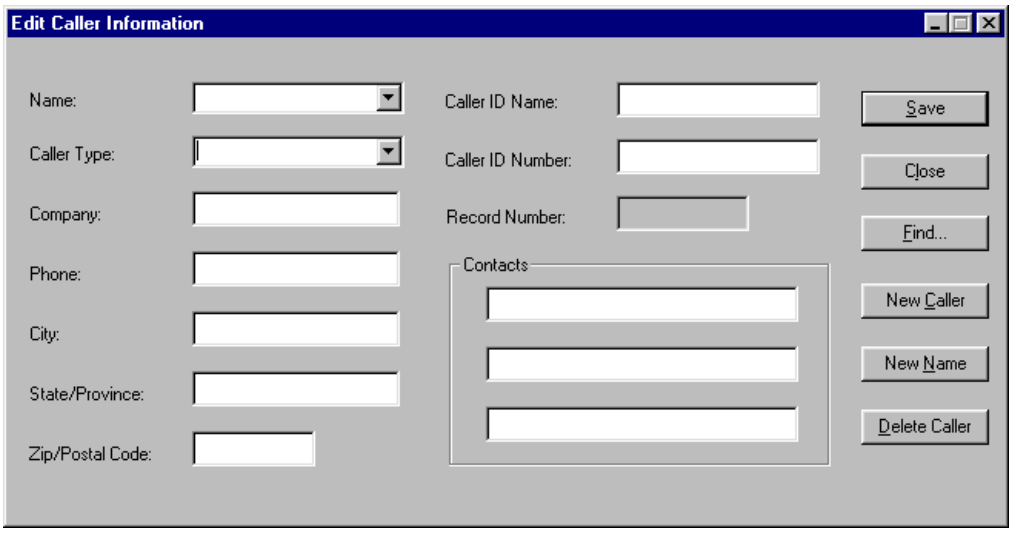
| | |
|---|---|
| Edit... | opens the Edit Caller Information dialog box. Refer to Maintaining caller information on page 63. |
| Hold | places the active call on Hold. |
| Release | disconnects the active call. |
| Park/Page | places the active call in park and opens the Page dialog box so that you can page the person whose extension is in the Target list box.<br>Refer to Parking calls and paging employees on page 51. |

### The Edit Caller Information dialog box

Use the Edit Caller Information dialog box to change or add information about callers.

To access the Edit Caller Information dialog box:

1. Below the **Caller Information** options, click the **Edit** button.



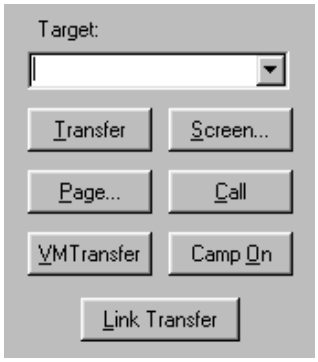

The Edit Caller Information dialog box contains the following boxes:

| | |
|---|---|
| Name list box | contains the caller's name. A first time caller name is the Caller ID name provided by the telephone. company. You can change this Caller ID name to the actual caller's name. |
| Caller Type list box | contains the classification of the caller. There are five types to choose from: Unclassified, Personal, Employee, Vendor and Customer. |
| Company box | contains the name of the company associated with the caller. The Caller ID name is automatically filled in this box. You can edited it here or in the Caller Information options. |
| Phone box | contains the caller's telephone number of the caller. |
| City, State/Province, and ZIP/Postal Code boxes | contain the caller's address. |
| Caller ID Name and Caller ID Number boxes | contain information provided through subscription by the public switched telephone network. |
| Record Number box | contains a unique caller record identifier number. This box is not editable. |
| Contacts boxes | list the caller's three most frequently called persons in your company. |

The following buttons appear in the Edit Caller Information dialog box:

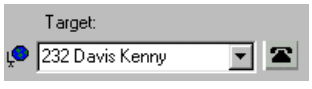
| | |
|---|---|
| Save | saves the caller record displayed in the boxes of the Edit Caller Information dialog box to the database. |
| Close | closes the Edit Caller Information dialog box without saving the changes to the record. |
| Find... | opens the Find dialog box in the Edit Caller Information dialog box. |
| New Caller | creates a blank caller record that you can add information to. |
| New Name | creates a new name caller record using an existing caller record. All boxes except the Name box contain the existing caller information. You must enter the new name. |
| Delete Caller | deletes caller record displayed in the Edit Caller Information dialog box from the database. |

## Using the call processing area




The call processing area is at the top right of the Attendant window and includes:

- the Target list box
- a series of buttons including: Transfer, Page, VMTransfer, Screen, Call, Camp On and Link Transfer.

| | |
|---|---|
|   | Use the Target list box to enter the extension or telephone number to call. |

The following buttons are in the call processing area:

| | |
|---|---|
| Transfer | transfers the active call to the extension number in the Target list box. |
| Screen... | screens a call transfer of an active call to the extension number in the Target list box. Click the Screen button and the caller is put on hold. The caller is connected to the Target extension when you click Transfer Now in the Screen Transfer dialog box. |
| Page... | opens the Page dialog box. |
| Call | makes a call from the attendant's extension to the number in the Target list box. |
| VMTransfer | transfers the active call to the voice message mailbox of the extension in the Target list box so the caller can leave a message. |
| Camp On | places a call on hold at the target extension. |
| Link Transfer | accesses Centrex/CO line features (such as off-premise transfer or conference) or other systems or carriers while on an outside call. It is also used to tone dial the digits in the Target list box. |

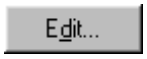
## Using the Directory options

The Directory options are at the bottom of the Attendant window. They contains tabbed directories that show various views of the extensions on your Enterprise Edge telephone system. The Directory options also contain buttons and boxes for searching and editing extension and employee information.

### Search and edit functions in the Directory options

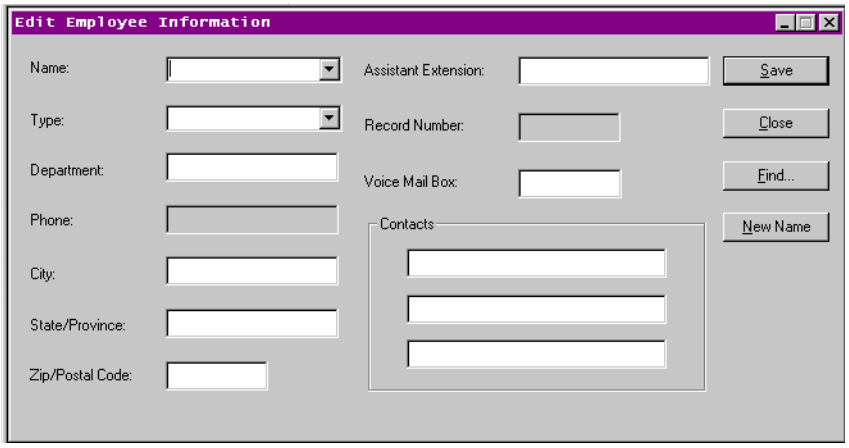
The buttons and boxes in the Directory options are used to search for and edit employee information that appears in the Directory list:.

| | |
|---|---|
| Status: | indicates the status of the employee. When you select a category from the list box, a corresponding icon appears in the first column of the Directory list. The available category are: None, Not at Desk and Out of Office. |
| Note: | used to enter information about individual employees. |

| | |
|---|---|
| | changes the caller/Caller ID record to an employee record if an employee calls in from outside. This prevents an employee name from appearing in the caller record related to the Caller ID name/number. |
| | finds names of individual employees or groups of employees by department. The Find box finds employee by name. The Department box is finds employees by department. Type the first few letters of the name in the Find box and click the Find button. Names that start with the letters appear in the Directory list. To search by department, select a department from the Department list box and then click the Find button. Employees in the selected department appear in the Directory list. |
| | resets the Full tab Directory view to display all names and extensions. |
|  | opens the Edit Employee Information dialog box. If you select a name or extension in the Directory list, information about to that name or extension appears in the dialog box. If you do not select a name or extension, the Edit Employee Information dialog box is empty. You can also access the Edit Employee Information window by clicking the Edit menu and clicking Employee Information. Refer to The Edit Employee Information dialog box on page 40 and Maintaining employee information on page 67. |

### The Edit Employee Information dialog box

This dialog box appears when you click the **Edit** button in the **Directory** option. Use the Edit Employee dialog box to change or add information about employees. For further information, refer to Maintaining employee information on page 67.




The Edit Employee Information dialog box contains the following boxes that are editable unless indicated otherwise:

| | |
|---|---|
| Name list box | contains the employee's name or the extension number if a name is not entered. |
| Type list box | contains the classification of the employee record. "Employee" is the default. |
| Department box | contains the name of the department associated with the employee. |
| Phone box | contains the employee's telephone number. The Phone box is not editable. |
| City box | contains the employee's city. |
| State/Province box | displays the state or province of the employee. |
| ZIP/Postal Code box | displays the ZIP code or Postal Code of the employee. |
| Assistant Extension box | displays the extension of the person who handles calls for the extension when the employee cannot. |
| Record Number box | displays a unique record identifier number. The Record Number box is not editable. |

| | |
|---|---|
| Name list box | contains the employee's name or the extension number if a name is not entered. |
| Voice Mail box | displays the voice message mailbox extension of the employee. Voice Mail Box is not editable. |
| Contacts boxes | lists the employee's three most frequently called persons/extensions in the Company. |

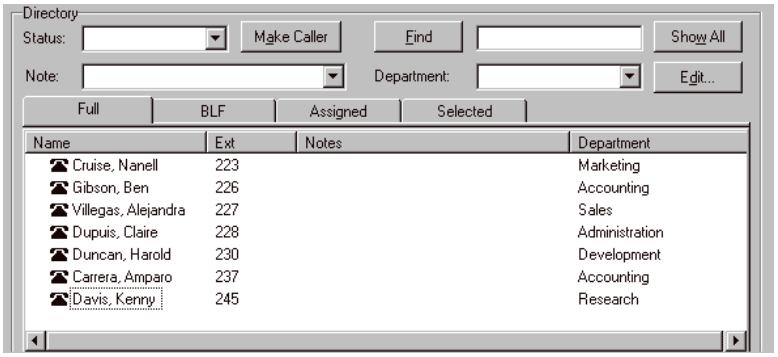
The following buttons appear in the Edit Employee Information dialog box:

| | |
|---|---|
| Save | saves the employee information displayed to the database. |
| Close | closes the window without saving the record. |
| Find... | opens the Find dialog box in the Edit Employee Information dialog box. Refer to Maintaining employee information on page 67. |
| New Name | creates a new name for the extension and leaves all other boxes unchanged. |

## Directory list

### Directory list tab views

There are four Directory list views that are accessed by clicking tabs. They are:.




| | |
|---|---|
| Full | displays extensions connected to the Enterprise Edge server, including wireless Companion telephones, Enterprise Edge Voice Messaging extensions and Hunt group extensions. This view displays the maximum amount of extension and employee information allowed in the Directory list. |

| | |
|---|---|
| BLF | displays extensions connected to the Enterprise Edge server, including wireless Companion telephones, Enterprise Edge Voice Messaging extensions and Hunt group extensions. This view displays only the person status icon, telephone status icon and employee name. This allows more extensions to be displayed at once. |
| Assigned | displays specific extensions for which an assistant attendant is responsible. Like the Full tab view, the Assigned tab view displays the maximum amount of extension and employee information allowed in the Directory list. Extensions are assigned or removed from the Assigned tab view in the Options dialog box. Refer to Assistant attendant setup on page 20. |
| Selected | displays a subset of the Full tab extensions. The Selected tab view displays the maximum amount of extension and employee information allowed in the Directory list. Selected extensions are particularly useful if the attendant directs incoming calls to a limited number of extensions and wants to display only those extensions. Extensions are added or removed from the Selected tab in the Options dialog box. |

**Directory list employee and extension information**

Each one of the Directory list tab views contains the following types of employee and extension information.

**Note:** The first two columns are not labeled and contain icons only, no text.

| | |
|---|---|
| person status icon | This is the leftmost column in the Directory list views and does not have a column heading. It can contain an icon or be blank. The person status icon shows the physical location of the employee. Refer to Search and edit functions in the Directory options on page 38. |
| telephone status icon | This is the second column from the left in the Directory list views and does not have a column heading. The telephone icons show the current status of the telephones connected to the Enterprise Edge Server. They also show additional information such as whether the extension is ready to receive calls or is on Do Not Disturb (DND). The telephone icons are: |

| | Available for calls | Do Not Disturb | Call Forwarded |
|---|---|---|---|
| On-hook | | | |
| Off-hook | | | |

| | |
|---|---|
| | **Note**:A Hunt Group is a group of telephones that can all be called by a single number. Hunt Groups are configured in your Enterprise Edge server. The telephone status icon for a Hunt Group extension is blue and always indicates on-hook. |

The remainder of the columns in the Directory list are labeled as follows:

| | |
|---|---|
| Name | the first labeled column on the left, containing the names of employees. |
| Ext | contains telephone extensions. |
| Notes | displays additional information about the employee that the attendant enters. Notes can be edited only from the Notes list box at the top of the Directory dialog box. |
| Department | displays the name of the department to which the employee belongs. Enter the department by clicking the Edit button, clicking Employee Information and using the Edit Employee Information dialog box. Refer to Maintaining employee information on page 67. |

#### Sorting information in the Directory list tabs

Extension and employee information contained in the Directory list tabs can be sorted in different ways. In the Full, Assigned and Selected views, the information appears in columns with headings.

To sort alphabetically by Name, Notes or Department:

1. In the **Directory** list, click either the **Name**, **Notes** or **Department** column heading. The information sorts alphabetically by the column you select.

To sort numerically by extension:

1. In the **Directory** list, click the **Ext** column heading. The information sorts numerically by extension.

# Handling calls 5

With Enterprise Edge Attendant Console, you can manage calls using either your PC's mouse or the keyboard. When a call comes in, you can respond to the caller using either the telephone or a headset.

**Note:** You can use a headset so that your hands are free to use your PC.

The basic steps in processing an incoming call with Enterprise Edge Attendant Console include:

- answering a call. Refer to Answering calls as an attendant on page 45.
- finding the called person's extension and placing it in the Target list box. Refer to Finding the called person's extension and placing it in the Target list box on page 47.
- transferring a call. Refer to Transferring a call on page 49.

Other telephone functions include:

- parking the incoming call and paging the employee. Refer to Parking, holding and screening calls on page 51.
- linking and joining calls. Refer to Linking and Joining calls on page 56.
- handling a callback call. Refer to Handling a callback call on page 57.
- making a call from the attendant's extension. Refer to Making a call from the attendant's extension on page 59.
- managing calls at the employee's telephone. Refer to Managing calls at the employee's telephone on page 60.

The following steps explain how you handle calls as an attendant using the Attendant window. For further information about and a diagram of the Attendant window, refer to Components of the Attendant window on page 25.

## Answering calls as an attendant

The Attendant window has six Loop buttons that are used to answer calls.

Each Loop button can handle a single call in progress. The color of the Loop button changes depending on the activity. You can show or hide inactive Loop buttons by clicking **Hide Loop Buttons** on the **View** menu. If they are hidden, the Loop buttons appear only when a call occurs. When the Loop Overflow icon appears on the Status Bar there are more calls that the six indicated by the Loop buttons.

A new incoming call appears as yellow Loop button that displays the word Ringing. Information about the call appears beside the Loop button to assist you with personalized call processing:

- the function key name above the Loop button, (F1 in the example) shows the key on the PC keyboard that relates to the ringing Loop button.

- the timer above the Loop button shows in minutes and seconds how long the call is active.
- the company name to the right of the Loop button, shows the company that is calling. The company name is either from the caller database or, if the caller is new, from the Caller ID name provided by the telephone company. If you do not subscribe to Caller ID service, this line of display is blank. You can enter or edit a company name using the Caller Information list box.
- The Caller ID name on the second line of the information to the right of the Loop button, shows the Caller ID number provided by the telephone company. If you do not subscribe to Caller ID service, this line of display is blank.
- The bottom line of information to the right of the Loop button displays the name of the Enterprise Edge server line that carries the call.

**Note:** Server line names are programmed in your Enterprise Edge server by your telephone administrator.

**Note:** If your Enterprise Edge server is shared by two or more companies, the telephone administrator can associate the names of each company with their hardware lines. This means that you can tell which company is being called before answering the call.

To answer an incoming call:

1. A Loop button turns yellow and the label changes to Ringing. You can respond to a call one of four ways:

    - Click the yellow **Ringing Loop** button.
    - Press the function key on the PC keyboard (for example, **F1**) shown above the Loop button.
    - Press the **Esc** key.
    - Press the associated intercom or line key on your telephone.

The Loop button becomes green and displays the word Active.

2. Answer the call with your company greeting and determine from the caller to whom they wish to speak. If you are answering a call from this number or company for the first time, you can enter caller information. For further information, refer to The Edit Caller Information dialog box on page 36. If you are not, refer to Finding the called person's extension and placing it in the Target list box on page 47.

To release or hang up a call:

1. Click the **Release** button.
   The call disconnects and the Loop button becomes idle.

## Finding the called person's extension and placing it in the Target list box

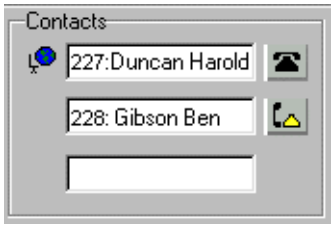
After you answer a call, find and click the called extension to put it in the Target list box.

There are four ways to locate the correct extension when you are ready to process a call, including:

- Using the Contacts boxes on page 47
- Using the Directory tab views on page 48
- Using the Directory Find box on page 48
- Using the Department list box on page 49

### Using the Contacts boxes

The Contacts boxes contain the extension numbers and names of the three most frequently called parties that the caller requests. These caller contacts are listed from most frequently to least frequently called.



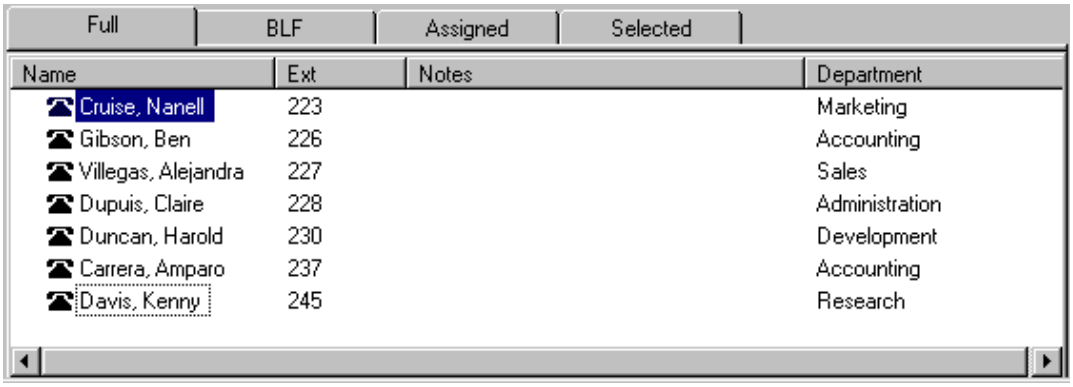

To the left of each Contact box is the current person status icon for that contact, and to the right of each Contact box is that person's telephone status icon.

To transfer a caller to one of the three most frequently called parties:

1. Double-click the telephone status icon.
   The call is forwarded to that extension.

## Using the Directory tab views

The tab views in the Directory dialog box contains various views of extensions.




To search by Extension or Name:

1. Click the **Full**, **BLF**, **Assigned** or **Selected** tab.

2. Click the extension, the name or the department of the employee being called in the list. The name or extension number now appears in the Target list box.

3. Click the **Transfer** button.

## Using the Directory Find box

Use the Directory Find box to search by name.

To search by Name and move the target extension to the Target list box:

1. In the **Find** box, type the first letter or letters of the person's last name or first name, depending on how the employee names are entered. For example, if they are entered "Jane Doe", type "j". If they are entered "Doe, Jane", type "d".

2. Click the **Find** button.
   Any matching names are displayed in a list under the Full tab.

3. In the **Directory** list, click the name of the employee being called.
   The name now appears in the Target list box.

4. To restore all names in the Full tab view, click the **Show All** button.

After the search result is shown in the Full tab view, the BLF, Selected and Assigned tab views remain unchanged.

### Using the Department list box

You can search for a name by department from the Full tab using the Department list box.

To search by department:

1. Click the arrow of the **Department** list box.
   A list of departments associated with extensions appears in the list.

   **Note:** Department names for each extension are created in the Edit Employee Information dialog box.

2. Click a department name from the list and the department name appears in the Department box.

3. Click the **Find** button.
   All extensions that match the department appear in a list under the Full Directory tab view.

4. In the **Directory** list box, click the name of the employee being called.
   The name appears in the Target list box.

5. After the search result is shown in the Full tab view, the BLF, Selected and Assigned tab views remain unchanged. To restore all names in the Full tab view, click the **Show All** button.

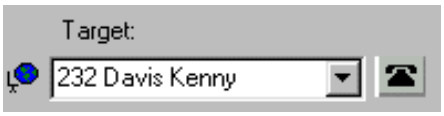
## Transferring a call

You can transfer an active call to an extension using the Contacts box, the Target list box or the Directory dialog box. You can also transfer a call to a voice message mailbox.

To transfer using the Contacts box:

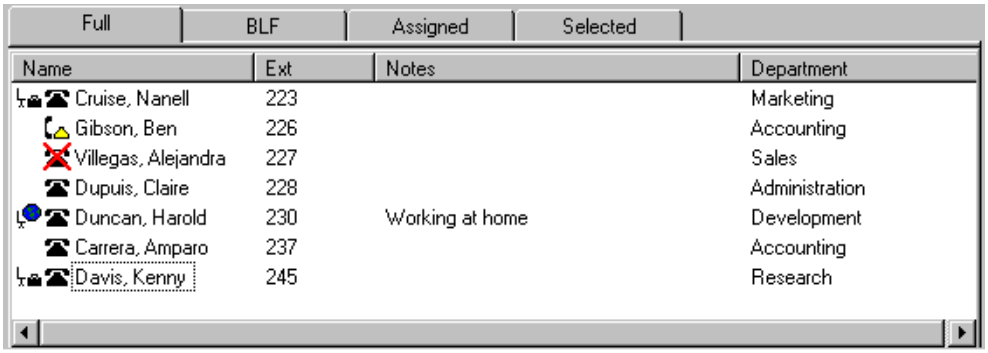
1. Double-click the telephone status icon to the right of the **Contacts** box.
   The call transfers to the displayed extension.

To transfer using the Target list box:




1. Make sure the extension in the Target list box is correct. Double-click the telephone status icon to the right of the Target list box or click the **Transfer** button. You can also click the **Target** list box and press the **Enter** key on the keyboard.
   The call transfers to the displayed extension.

To transfer using the Directory list:




1. Scroll through the Directory list. Double-click the telephone status icon or the name of the person to whom you are transferring the call.
   The call transfers.

To transfer a call to the voice message mailbox of the extension in the Target list box:

1. Type the extension number of the employee in the **Target** list box.

2. Click the **VMTransfer** button.
   The caller transfers and the Loop button becomes idle.

   **Note:** You can make the VMTransfer button inactive when a non-Enterprise Edge Voice Messaging system is attached to the Enterprise Edge server.

To transfer a call to an outside number:

1. With an active incoming call on Enterprise Edge Attendant Console, in the **Target** list box type an outside telephone number.

2. Click the **Link Transfer** button.
   The Loop button label shows Active, and the number in the Target list box is tone dialed.

3. Click the **Release** button and the incoming call transfers to the outside telephone number.
   The Attendant disconnects from the call and the Loop button becomes idle.

## Parking, holding and screening calls

Enterprise Edge Attendant Console lets you screen calls for the called person, place the calls on hold and park calls so that you can page the called person. You can also talk to the employee in intercom mode using Voice Call.

### Parking calls and paging employees

The Park/Page feature lets you place a call on Hold and page the employee. You can also use this method to page an employee when there is no active call.

To park a call and page an employee:

1. In the **Target** list box type the extension number of the called person.
   If there is no active call and you want to page an employee, type or select the extension of the person being paged in the Target list box.

2. Click the **Park/Page** button.
   The Page dialog box appears. The Page dialog box shows all parked calls and all page zones so that the called person can be paged.

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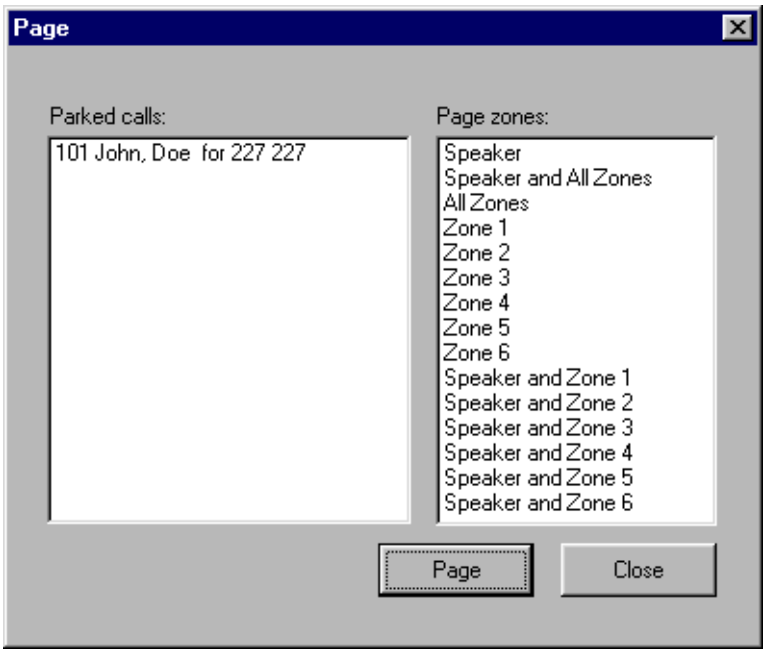



3. Click a call in the **Parked calls** list and then click the appropriate zone in the **Page zones** list.

4. Click the **Page** button.
   The Console Message box appears and the speakers on the telephones in the selected zone emit a low-level audible tone.

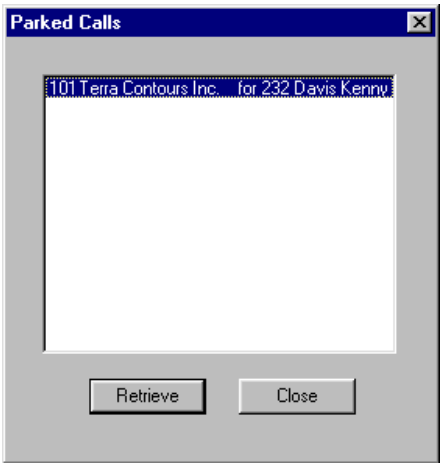
5. Speak into the headset or handset, depending on your setup. When you are finished, click the **OK** button.

To retrieve a parked call:

1. On the **Caller** menu, click **View Parked Calls.**
   The Parked Calls dialog box appears.

2. In the **Parked Calls** list click the parked call.

3. Click the **Retrieve** button.




or

1. On the toolbar, click .

2. In the **Parked Calls** list select the parked call.

3. Click the **Retrieve** button.

To view all parked calls that are still in park:

1. On the **Caller** menu, click **View Parked Calls**.
   The Parked Calls dialog box appears and lists all parked calls and:
   - the park number of the call
   - the caller's name (from the Name box of the Caller Information list box)
   - the name or extension of the called employee

2. Click the **Close** button.
   The Parked Calls dialog box closes.

## Placing and retrieving calls on hold

Calls can be placed on Hold and retrieved quickly.

To put an incoming call on hold:

1. Click the Ringing Loop button.

2. Click the **Hold** button or click another Ringing Loop button.
   The previous call is put on hold.
   When the active call is placed on hold, the Loop button label changes to Hold and the Loop button color changes to blue.

To place a call on Hold at an active extension:

1. With an active call on the Loop button and the employee's extension in the **Target** list box, click the **Camp On** button.
   When the active call is camped on the Target list box extension (placed on hold at the Target extension), the Loop button becomes idle.

2. The camped call sends a message with tones to the employee either on or off the telephone, indicating a call is camped on their extension.

To retrieve a call on Hold:

1. Click the blue Loop button labeled **On Hold**.
   The Caller Information boxes show all of the information related to this call.

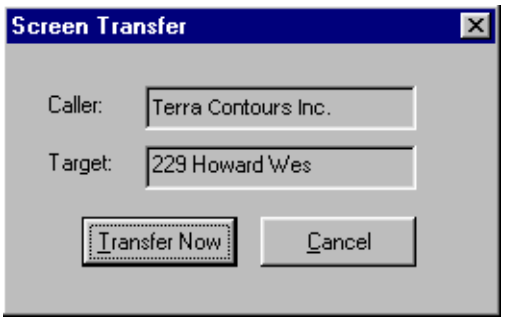
2. Respond to the call accordingly.

## Screening calls

You can screen calls by talking with the employee and asking whether they want to talk to the caller.

To screen/transfer a call:

1. Click the **Screen** button.
   The active call goes on hold. The Loop button changes color to blue. The extension rings and the Screened Transfer dialog box appears.




2. Ask the person being called if they can take the call. If the answer is yes click the **Transfer Now** button and the call transfers. If the answer is no follow steps 3 to 5.

3. Click the **Cancel** button.

4. Click the Loop button on which the call is being held to reconnect with the caller.

5. Process the call accordingly.

## Contacting employees using Voice Call

You can use this feature as an intercom to talk directly through the speaker of the employee's telephone.

To use the Voice Call button:

1. In the **Target** list box type or enter the extension of the employee.

2. On the toolbar, click .

3. Speak to the employee through the speaker in their telephone.

## Linking and Joining calls

Using Enterprise Edge Attendant Console, you can link calls to create conference calls or have callers join existing calls to also create conference calls.

**Note:** Use the DTMF button to transfer or link calls on Centrex lines.

To use the DTMF button with an active incoming call on a Loop button:

1. On the toolbar click .
   The active incoming call is placed on hold.

2. In the **Target** list box type an outside telephone number.

3. On the toolbar click .
   The number in the Target list box is dialed out with DTMF tones on the same CO line on which the active incoming call arrived.

4. Click the **Release** button and the incoming call transfers to the outside telephone number (using the telephone company's Centrex capability). The Attendant disconnects from the call and the Loop button becomes idle.

To Join a call on hold on a Loop button with an active call on another Loop button:

1. On the toolbar click .

2. Drag the "Join" cursor to the Loop button on which the call is held.

3. Click the Loop button holding the call.
   The two callers connect, the Attendant releases from the active call and both Loop buttons become idle.

To create a conference call to an outside number:

1. With an active incoming call on Enterprise Edge Attendant Console, in the **Target** list box type an outside telephone number.

2. Click the **Link Transfer** button.
   The Loop button label shows Active, and the number in the **Target** list box is tone dialed.

3. Click the **Link** button to set up a conference call between the incoming call, the outgoing call and the Attendant.

When the conference call is finished, click the **Release** button to disconnect from the call.

**Note:** To disable the Link Transfer button, on the **Tools** menu click **Options**. The Options dialog box appears. Select **Disable Link Transfer Option**.

## Handling a callback call

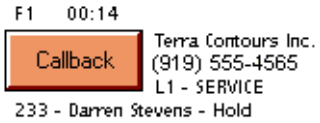
There are two types of calls that return to Enterprise Edge Attendant Console:

- a call that is not answered at the extension to which it was transferred
- a call that the called person returns to you for attendant handling

### Responding to a callback that an extension did not answer

A callback can be a call that is sent to an extension, or a call that is not answered and returns to you.

The callback is indicated by:




The Callback button displays the name and extension from which the call is returned and other call related information. This allows you to personalize how you handle the call.

To respond to a Callback call:

1. Click the **Callback** button.

The Caller Information list box shows the information originally displayed so that you can process the call accordingly, such as transfer to Enterprise Edge Voice Messaging, park the call, page the called person, and so on.

### Responding to a callback that a called party returned

A call that the called person elects not to take can be handled by you according to instructions that you or your company establish. This type of call is similar to a Callback to the attendant. The called person can use the buttons below the display area of the telephone to communicate to you, the attendant, how to handle the call with one of the following messages:

- `Hold`. You ask the caller to hold for a moment.
- `Assist`. You send the caller to the called party's assistant.
- `IntAct`. You inform the caller that the person they called is on the line and ask if they wish to interrupt the call.

The display button the employee presses sends a pre-set message to you. Either Hold, Assistant or Interact is displayed below the Callback button.

To respond to a Callback call that a called party returned:

1. Click the **Callback** button.
   The Caller Information list box shows the information originally displayed.

2. Advise the caller according to the pre-set message that appears.

To process a hold call:

1. Advise the caller that the employee requests that they hold.

2. In the **Target** list box enter the employee's extension.

3. Click the **Camp On** button.
   The call is camped to the called employee's extension.

To process an assistant call:

1. Tell the caller that the employee is temporarily unable to take calls and requests that calls are routed to the Assistant extension.

2. Click the **Edit** menu and then click **Employee Information**.
   The Employee Information dialog box appears and the assistant's number appears in the Assistant Extension box.

3. Click the **Close** button to return to the Attendant window.

4. In the **Target** list box enter the assistant's extension number.

5. Transfer the call to the assistant's extension number.

To process an interact call:

1. Tell the caller that the employee is on another call but can be interrupted.

2. If the caller agrees, enter the employee's extension in the **Target** list box.

3. Transfer the call back to the extension.

## Making a call from the attendant's extension

As the attendant, you can call any extension in the company and any outside number. The telephone number you type in the Target list box does not require special characters such as a hyphen, a parenthesis, a blank space or a comma (special characters are ignored). However, to reach special services such as Interactive Voice Response systems (IVR) you can type special characters (*, #, P, and W) in the Target list box and these characters can be dialed using on the toolbar.

To place a call to an extension or outside number:

1. When there is no active call, type or select an extension or outside number in the **Target** list box.

2. Press **Enter** on the keyboard.
   A call is made to the extension/outside number.

To transfer a call to an extension:

1. Place or type an extension in the **Target** list box when there is an active call.

2. Press **Enter** on the keyboard.
   The call transfers to the extension.

If you select an entry in the Directory or in the Contacts box, the extension number also appears in the Target list box. If the Target is an extension, the Person Status icon for the person appears to the left of the Target list box. To the right of the Target the person's telephone status icon appears.

To make a call to an inside extension:

1. Make sure that the number you want to call appears in the **Target** list box. You can type the extension in directly or select it from the Directory list.
   For further information, refer to Using the Directory Find box on page 48.

2. Click the **Call** button or press the **Enter** key to make the call.

To make a call to an outside number:

1. In the **Target** list box type the same digits you dial if you were using your Enterprise Edge telephone.

2. Click the **Call** button or press the **Enter** key.

## Managing calls at the employee's telephone

Enterprise Edge Attendant Console has features that let employees manage their calls from their telephones.

After a call is routed to an extension, a low-level audible tone alerts the called person they have an incoming call, even if they are on their telephone. The name of the caller appears in the display area of the called party's telephone for a few seconds.

The called person has six options for managing the call using the three display buttons below the display area of the Enterprise Edge telephone. These options are:

- talk to the caller
- put the call on hold
- send the call to Enterprise Edge Voice Messaging
- join the call with the current call
- send the call back to the attendant to ask the caller if they wish to interrupt the current call
- send the call back to the attendant to be routed to an assistant attendant

**Note:** Press the Next display button to see more than the first two options that appear.

To talk to the caller:

1. Press the Talk display button to automatically connect with the call, or pick up the handset.

If the telephone is in use, press the Talk display button to put the first call on hold and connect the new caller.

To send the caller to the attendant who asks the caller to hold:

1. Press the Hold display button
   This delivers a pre-set message to the attendant. The attendant asks the caller to hold for the called person and camps the call to the called person's extension.

2. The called person sees the call camped on their telephone and handles the call.

To send the caller to Enterprise Edge Voice Messaging:

1. Press the VM display button on the telephone.
   The call automatically transfers to the called person's voice message mailbox.

To join the caller with another call:

1. Press the Join display button to conference the caller in with your current call.
   The called person can see the caller's name or Caller ID name in the display area of the Enterprise Edge telephone and decide whether to join the caller with the current call.

To send the call to the attendant who asks the caller if they want to interrupt:

1. Press the IntAct display button. This delivers a pre-set message to the attendant who asks the caller if they want to interrupt the employee.

2. If yes, the attendant transfers the call back to the employee.

3. The calling party's name appears in the Enterprise Edge telephone display area of the called person's telephone for approximately 20 seconds. To pick up the call that the attendant transfers back, press the Talk display button.

To send the caller to an Assistant extension:

1. Press the Assist display button. This delivers a pre-set message to the attendant. The attendant tells the caller that the called person is temporarily unable to take calls and requests that they are transferred to an Assistant extension.

2. The attendant refers to the **Assistant extension** box in the **Edit Employee Information** dialog box and enters the Assistant extension number in the **Target** list box.

3. The attendant transfers the call to the Assistant extension.

# Maintaining caller and employee information 6

Enterprise Edge Attendant Console manages both caller and employee information.

## Maintaining caller information

When your company is called, information about the caller from the Enterprise Edge Attendant Console database appears in the Caller Information list box of the Attendant window. You can decide to enter information for an incoming call depending on whether the caller is calling for the first time or has called previously and already exists in the database.

### Creating a new caller record

New caller records are created in the following ways:

- automatically, during an active call, the first time Caller ID information is received by the Attendant component. You can customize the new caller record during the active call or later.

  **Note:** The caller record is not saved if you click the Release button without processing the call.

- when you create a new caller record from an existing one
- when you create a new blank caller record

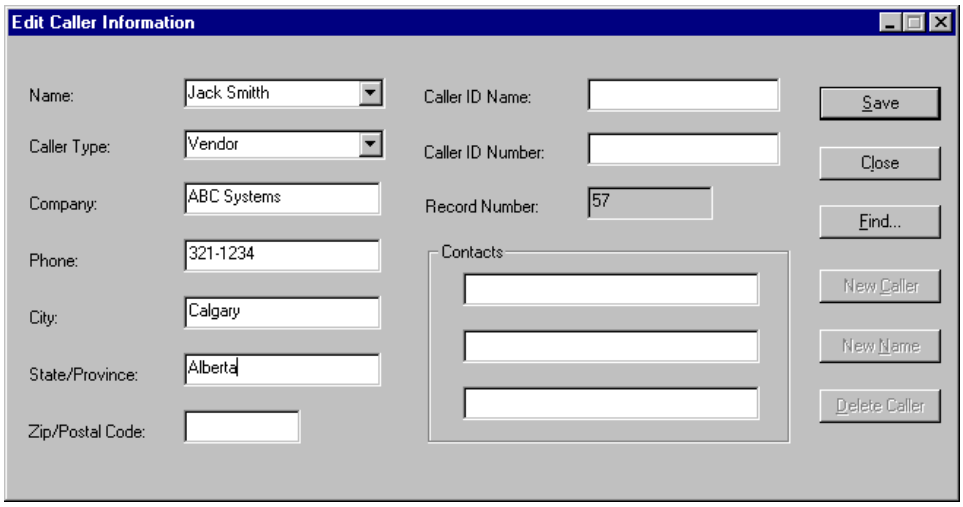
When a call comes in, Enterprise Edge Attendant Console checks the Caller ID from the telephone company to see if the number has previously called. If there is a record that the number has called before, information from the caller database appears in the Caller Information list box on the Attendant window. The Name list box displays the names of callers on record that are associated with the incoming Caller ID. There can be several callers from the same telephone number calling if they are employees at the same company. For more information, refer to The Edit Caller Information dialog box on page 36.

If you select the name of the caller from the list, the Caller Information list box displays information about the caller.

To create a new caller record from an active call:

1. Click the Ringing Loop button to answer the incoming call.
   Information in the database about the caller appears in the Caller Information list box on the Attendant window.

2. In the **Caller Information** list box click **Edit**.
   The Edit Caller Information dialog box appears.




3. Click the **New Caller** button.
   This clears all the boxes in the Edit Caller Information dialog box and allows you to create a new caller record.

4. In the **Name** list box, type the caller's name in the format of last name first, space, then first name.

5. From the **Caller Type** list box, select a Caller Type, either Unclassified, Personal, Employee, Vendor or Customer.

6. In the **Company** box, type the caller's company's name.

7. Click the **Save** button to save the information.
   If you click the Close button without saving, the message, "Do you want to save the current record?" appears. Click the **Yes** button to save the record.

8. After you enter caller information, process the call by:
   - transferring the call to the called party. Refer to Transferring a call on page 49.
   - placing the call on hold. Refer to Parking, holding and screening calls on page 51.
   - transferring the call to Enterprise Edge Voice Messaging. Refer to Transferring a call on page 49.
   - parking the call and paging the called party. Refer to Parking calls and paging employees on page 51.

To create a new name caller record from an existing caller record:

1. On the Attendant window, in the **Caller Information** options, click the **Edit** button.
   The Edit Caller Information dialog box appears.

2. Click the **New Caller** button.
   This clears only the Name box in the Edit Caller Information dialog box and leaves all other boxes unchanged.

3. In the **Name** list box type the new caller's name.

4. Click the **Save** button when you are done to save the record.

To create a new caller record when there are no active calls:

1. On the Attendant window, in the **Caller Information** options, click the **Edit** button.
   The Edit Caller Information dialog box appears.

2. Click the **New Caller** button.
   A new blank caller record is created with a new Record Number assigned.

3. Type the desired information in the boxes.

4. Press the **Save** button to save the new caller record.

To create a new caller record associated with an existing Caller ID when there are no active calls:

1. On the Attendant window, in the **Caller Information** options, click the **Edit** button.
   The Edit Caller Information dialog box appears.

2. Click the **Find** button.
   The Find dialog box appears.

3. In the **Name** box type the name of another caller from the same company and click the **OK** button.

4. Click **New Name** and the **Name** box is cleared. The other boxes are unaltered.

5. Type the new caller's name.

6. Click the **Save** button.
   The record is now saved in the database.

7. Click the **Close** button.

**Note:** If you click the Close button without first clicking the Save button, the Edit Caller Information dialog box closes without saving any changes.

## Finding and editing caller information

You can edit caller information at any time and save the changes.

To find caller information:

1. In the Attendant window, in the **Caller Information** options, click the **Edit** button.
   The Edit Caller Information dialog box appears.

2. Click the **Find** button.
   The Find dialog box appears. Use the Find dialog box to find a caller's name in the database.

3. In the **Name** box, type the first letter or letters of the caller's last name.

   **Note:** If the caller's first name is used instead of their last name, type the first letter or letters of the caller's first name.

4. Click the **OK** button or press the **Enter** key.
   The Find dialog box closes.

5. Any matching names appear in the **Name** list box of the **Edit Caller Information** dialog box.
   If there is more than one name, a list appears below the Name box.

6. Click the caller name you want to edit.
   The information about the caller appears in the Edit Caller Information dialog box.

To edit a caller's record:

1. Make sure the caller name you want to edit appears in the **Edit Caller Information** dialog box. Click the box you want to edit and make the change. Repeat if needed.

2. Click the **Save** button to save the changes to the database.

3. Click the **Close** button to close the Edit Caller Information dialog box.

   **Note:** If you answer a call and then open the Edit Caller Information dialog box without first selecting a name from the Name box list, you must click the **Edit** button twice.

To delete an existing caller record:

1. In the Attendant window, in the **Caller Information** options, click the **Edit** button.
   The Edit Caller Information dialog box appears.

2. Make sure the caller name you want to delete appears.

3. Click the **Delete Caller** button.
   The record that appears in the Edit Caller Information dialog box is deleted from the database.

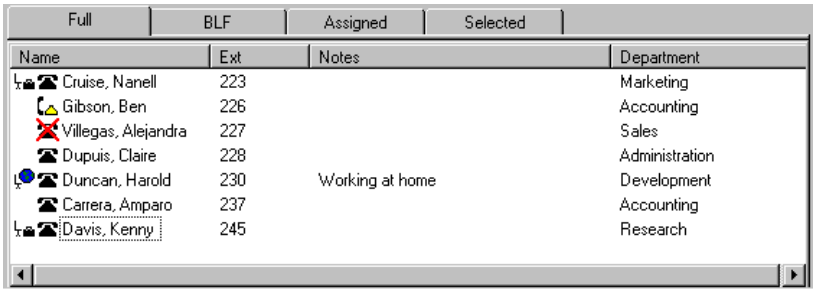
## Maintaining employee information

When Enterprise Edge Attendant Console is installed, employee information is extracted by the Enterprise Edge server. This information appears in the Directory list box in the bottom center of the Attendant window.

The Directory list box has four different tabs that display lists of employees. They are Full, BLF (Busy Lamp Field), Assigned and Selected. For further information, refer to Search and edit functions in the Directory options on page 38.

## Working with the Directory list

Information in the Directory list appears in ascending order (for example, 1 to 9 or A to Z), and sorting is based on the contents of only one column at a time. If there are different forms of information in the same columns, priority is given in the following order: no information entered (blank), numeric then alphabetic. For example, if you sort a Name column that contains both names and extension numbers, the extension numbers appear before the names.




You can sort Directory information by column by clicking any column heading. For example, to sort the directory by extension, click the Ext column heading. The listing appears with the extensions in numerical order.

To sort a column of information in the Directory:

1. Click the tab for the view you want to sort, either **Full**, **Selected** or **Assigned**. Information in the BLF tab view appears in the same order you select for Full view.

2. Click the column heading you want to sort, either **Name**, **Ext**, **Notes** or **Department**.

## Finding an employee record

You can search for an employee by name, by department or by an individual within a department.

You can search by an employee's name two different ways:

- on the Edit Employee Information dialog box click the Edit button and then click the Find button
- on the Attendant window, in the Directory list box, click the Find button

To search by name:

1. In the Attendant window, in the **Directory** options, click the **Edit** button.
   The Edit Employee Information dialog box appears. For more information, refer to The Edit Employee Information dialog box on page 40.

2. Click the **Find** button.
   The Find dialog box appears.

3. In the **Name** box, type the first letter or letters of the employee's last name.

   **Note:** If the employee's first name is used instead of their last name, type the first letter or letters of the employee's first name.

4. Click the **OK** button or press the **Enter** key.
   The Find dialog box closes. Any matching names appear in the Name box of the Edit Employee Information dialog box.

To search by name on any Directory list box on the Attendant window:

1. In the **Find** box on the Attendant window type the first letter(s) of the person's last or first name, according to how names are listed in the Directory list's Name column.

2. Click the **Find** button.
   Any names that match the letter(s) you enter appear in a list in the Full tab Directory view.

To search by department:

**Note:** A department search takes priority over a name search.

1. In the **Directory** options, click the arrow of the **Department** list box.
   A list of departments that are associated with extensions appear in the list. The name of the department for each extension appears in the Edit Employee Information dialog box.

2. Click the department name from the list and the department name appears in the Department box.

3. Click the **Find** button.
   Any extensions that match the department appear in a list in the Full tab Directory view.

To search for an individual in a department:

1. From the **Department** box select a department.

2. In the **Find** box type the person's name.

3. Click the **Find** button.
   Any extensions that match the name in the department appear in a list in the Full tab Directory view.

#### Resetting the Full tab view

You can reset the Full tab view to the default display.

To reset the Full tab view:

1. In the **Directory** options, click the Show All button.
   The Full tab view appears with extension, names, notes and department information.

2. Click the **Show All** button to return to the Directory view after you perform a search.

## Editing employee information

You can edit employee information by adding or changing an extension, changing the person status of an extension or by creating a new name for an extension.

To add or change an extension:

1. In any Directory tab view (Full, BLF, Selected or Assigned), click the extension in the **Directory** list for which you wish to change or add information.

2. In the Directory options, click the **Edit** button.
   The Edit Employee Information dialog box appears. Use this dialog box to create or edit information in the employee database.

3. Click any editable box and type the new information.

4. Click the **Save** button to save the changes to the database and to automatically apply the changes to the employee's extension in the Directory.

5. Click the **Close** button to close the Edit Employee Information dialog box.

To change the Person status of an extension:

1. In any of the Directory views (Full, BLF, Assigned or Selected), click the extension.

2. From the **Status** list box select **None**, **Not at desk** or **Out of office**.
   The status you choose appears as an icon in the Directory view to the left of the extension Name.

There is no icon for None. Instead, a blank space appears next to the person's telephone status if you select it. If you select Out of office the Out of office icon appears . If you select Not at desk the Not at desk icon appears .

Do not type in the Status box.

#### Creating a new name for an extension

You can change the name of an employee assigned to an extension.

To create a new name for an extension:

1. In the **Directory** options, click the **Edit** button.
   The Edit Employee Information dialog box appears.

2. Click the **New Name** button.

3. Type the new employee's name.

4. Click the **Save** button when you are done.

#### Using the Make Caller button

Use this function if an employee calls from a customer's office.

To assign the name of an employee to a caller record:

1. In the Directory list, select the employee's extension or type the employee's extension number in the **Target** list box.

2. Click the **Make Caller** button.
   The name of the employee is assigned to the caller record and is not saved as a customer record.

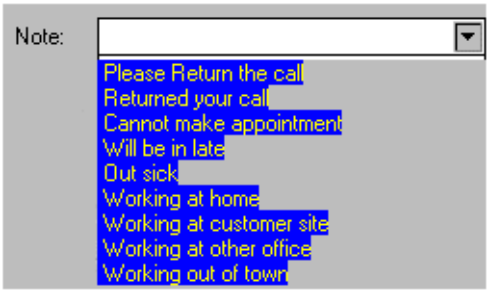
### Adding notes to employee records

You can add a note to an employee record by selecting a note from a list or typing a personal note. The note appears in the Notes column under Directory in the Attendant window.

To select from the list of notes:

1. Click an extension number in the **Full**, **Assigned** or **Selected Directory** views.

2. From the **Note** list box, click the applicable note.
   The note appears in the Directory list's Notes column.




To type a note:

1. Click an extension number in the **Full**, **Assigned** or **Selected Directory** views.

2. In the **Note** list box type a note.

3. Press the **Enter** key.
   The note appears in the Directory list's Notes column.

   **Note:** To delete a Note, delete the information in the **Note** list box and then press the **Enter** key.

To save employee edit changes:

1. In the Edit Employee Information dialog box click the **Save** button.
   The changes made to the boxes in the Edit Employee Information dialog box for the employee highlighted in the Directory list are saved to the database. After you click the Save button, the Edit Employee Information dialog box remains open.

To close the Edit Employee Information dialog box without saving changes:

1. Click the **Close** button.
   The Edit Employee Information dialog box closes.

**Note:** If you click the Close button without first clicking the Save button, the Edit Employee Information dialog box closes without saving any changes.

# Generating reports 7

Enterprise Edge Attendant Console automatically collects information about incoming calls and tracks how calls are processed. Use the information from the Reports component to help spot trends and prevent problems.

You can use the caller-related information in Reports to:

- increase sales opportunities
- improve productivity
- lower expenses
- streamline operations

For example, the report Calls by Customer shows how callers from your company's top customers are handled. It shows if calls are handled by employees or are routed to Enterprise Edge Voice Messaging.

## Report types

There are three report types:

- Calls by Customers
- Calls to Employees
- Extension Directory

### Calls by Customers report

The Calls by Customers report shows how your employees handle calls from your customers. Each employee report can identify as many customers as necessary. The Calls by Customers report shows:

- the number of calls taken by the employee
- the number of calls routed to Enterprise Edge Voice Messaging
- the number of calls handled by others
- the total calls from each customer

### Calls to Employees report

The Calls to Employee report shows the type of calls employees receive over a defined time period. This report can spot caller abuse, such as too many personal calls, and misdirected calls, such as calls from customers routed to the wrong person or department. This report lists the type of call across the top and employees down the left side. Each Caller Type has a column for number of calls and percent. The total of all calls and percent is shown separately.

### Extension Directory report

The Extension Directory report lists the employees who are in the Enterprise Edge Attendant Console database and the information in their call record.

## Working with the Reports window

To open the Reports window:

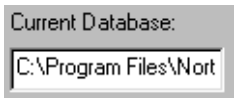
1. On the **Attendant** window click **Tools** and then click **Reports**.
   The Reports window opens.

The Reports window contains the Database, Information, Period, Employees and Customers list boxes and a report viewing area. The Reports window menus are File, Edit, View and Help.

Use the Create Report, Page <, Page > and Print buttons to define the type of report you create. You can manipulate the preview image after you create a report.

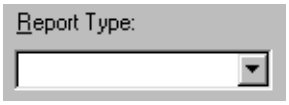
### Database box

The Database box contains information on selecting a database.

| | |
|---|---|
| | Click the Select button to open the Open dialog box from which you can select a Microsoft Access database. For more information about databases and how to locate the database (.mdb) file, refer to Loading the database on page 79. |
|  | Type the path name of a Microsoft Access database in the Current Database box. |

### Information list box

The Information list box contains the report type information.

| | |
|---|---|
|  | The Report Type is active and available if you set a valid Microsoft Access database in the Current Database box. |
| | If you select a report type, a description of the report type appears in the Description area. |

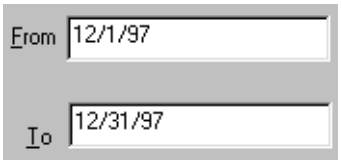
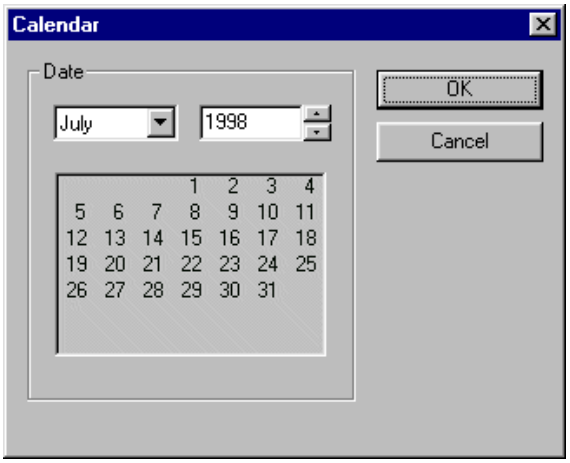
## Period list box

**Note:** The Period list box is active if:

- you select a valid database

  and

- you select a Report Type requires you to define a Report Period.

| | |
|---|---|
| | opens the One Week dialog box from which you can specify a report period with a duration of one week (Sunday through Saturday). |
| | opens the One Month dialog box. This dialog box lets you select a one-month Report Period. |
|  | shows the date of the beginning of the report period. The boxes change to reflect dates set by other controls such as the Month, Week, and Calendar buttons. The dates in the boxes are checked to ensure that the From date is earlier than or the same as the To date. If this rule is broken, an error message appears. |
| | opens the Calendar dialog boxes that you use to set the From and To Report Period Dates. The Calendar dialog box resembles the Calendar dialogs boxes in other Windows-based programs. The Calendar buttons are active if you select a valid database and you select a Report Type that requires you to define a Report Period.<br>  |

## Employees and Customers options

Use these options to define customers or employees to generate a report for.

The Employees and Customer options contain

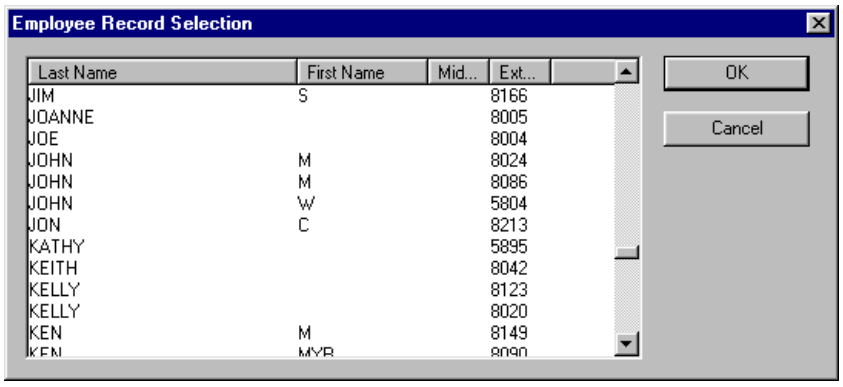
| | |
|---|---|
| All | generates a report that includes data for members of the selected category (Employees or Customers). |
| Select | generates a report that includes data for the members in the list box. If you click the Select option, the button under the selection list box (labeled either Customer or Employee) becomes available so you can make your selection. |

**Note:** The All and Select options for Employees or Customers are available only if you select a valid database, if you select the report period, and if you select a Report Type that uses the category Employees or Customers.

| | |
|---|---|
| list box | displays information if you select a subset of the customers and employees in your database. If you choose All, the list box is blank. The list box cannot be directly edited. If the selected list is long enough, you can scroll to view its contents. Use the buttons under the list box to change the contents of the list. |
| Customer/Employee option | access directories. The Employee and Customer options are active if you choose the Select option. Click these options to display either the Employee or Customer Record Selection dialog box, from which you can make your selection.<br>**Note:**These options are available only if you choose a valid database, if you have select a Report Period (if required), if you select a Report Type that involves either Employees or Customers, and if you choose the Select option for the category. |

### Customers and Employees Selection dialog box

From the Customer and Employee Selection dialog boxes, you can choose which Employees or Customers to include in a report.




The program records which items were selected in this dialog box the last time you created a report. When the dialog box opens, any items that were selected last time appear as selected. In this way, you can modify the list of selected items.

## Creating and viewing reports

Use the Reports component to generate quality reports for analyzing telephone use at your organization. The following section provides the steps required to generate reports, including:

- selecting the database
- selecting a report type
- setting the report period
- selecting employees and customers
- creating and previewing the report
- printing the report

### Loading the database

Enterprise Edge Attendant Console stores information about telephone use in your organization in a special database. This database is used to generate the different types of reports. In most cases you use the database installed on the Enterprise Edge server system. However, if you make backups of the database for archiving purposes, Reports can use these backups as well. If you are generating reports from a PC that does not have the database stored, locate the database on the server PC through Network Neighborhood. Check with the System Administrator to ensure that the database is a shared file.

To load the database:

1. On the **Reports** window, at the **Database** option, click the **Select** button.
   The Open dialog box appears.

2. In the **File name** box, type **"name of server"\consoleservicedb**
   where "name of server" is the name of your Enterprise Edge server. If you do not know the name of the server, ask your System Administrator.

3. Click the **Open** button.

4. Click **ConsoleService.mdb**

5. Click the **Open** button.
   The database loads to your PC and the database path appears in the **Current Database** box.

6. Click the **Close** button on the top of the Reports window to return to the Attendant window.

### Selecting a report type

After you load a database, decide what type of report to produce.

To select a report type:

1. From the **Report Type** list box select your report.

### Setting the report period

Some reports require a report period. The report period defines the time span for which data is considered. If you choose a report type that does not require a report period, the Period list box is inactive. The report period begins on the From date and ends on and includes the To date.

To enter the From and To dates:

1. In the **From** box type the date.
   The following are acceptable date formats:
   - June 5, 1997
   - 6/5/1997
2. Press the **Enter** key.
3. Repeat for the **To** box.
4. Press the **Enter** key.

**Note:** An error message appears if you type a date in an unrecognized format or if you type a date that does not exist.

To escape from the From or To boxes:

1. Press the **Tab** key or the **Esc** key.

To specify a report of one week:

1. Click the **One Week** button.
   The One Week dialog box appears.

2. In the **month** list box, choose the month that the desired week starts or ends.

3. In the **year** list box, select the year the week occurs in.
   You can type the year box or use the arrows.

4. In the list of weeks select a week and click the **OK** button, or double-click the desired week.
   After you select a week, the start and end dates of the week appear in the From and To boxes.

To specify a report of one month:

1. Click the **One Month** button.
   The One Month dialog box appears.

2. In the **month** list box, choose the desired month.

3. In the **year** select the desired year either by typing it or selecting it with the arrows.

4. Click the **OK** button to accept the month, or click the **Cancel** button to cancel your Report Period selection.

If you select a month, the start and end dates of the month appear in the From and To boxes. Dates for February automatically account for leap-years, centuries, and millennia.

To cancel a selection, press the **Esc** key or click the **Cancel** button.
The Period list box information does not change.

#### Clearing a date

You can clear a date by deleting the contents of the box. A cleared box does not count as a date, and does not restrict the range of the other date by the above mentioned-rule.

**Note:** The To and From boxes are active if you select a valid database and you select a Report Type that requires you to define a Report Period.

## Selecting employees and customers for the report

Some report types, especially those that deal with call data, allow you to choose sets of employees, customers, or both, for which the data is summarized in the report. Reports make categories available that are appropriate to the type of report that you chose. If your Report Type does not need or allow these selections, the Employees and Customers options remain inactive and you can go to the next step.

To select the Employees or Customers:

1. Click either the **Employees** or **Customers** option.
   The Employee or Customer Record Selection dialog box appears.

**Note:** The first time you click one of these options after you connect to a database, a wait cursor appears while Reports builds the directory. After Reports builds the directory, if you click an option, a pause occurs while Reports opens the dialog box. If a directory is large, the pause can be several seconds long. After the pause, the Selection dialog box appears.

2. The Selection dialog box contains a list of Employees or Customers. The list of Customers has a single column that lists the Customer's Company Name. The list of Employees has several columns that list the employee's last, first and middle names, and telephone extension. Resize the columns by dragging the column header edges in the bar at the top of the list.

3. You can choose either a single item or multiple items. Items that you select appear with a blue background behind their boxes. Choose a single item by clicking it. Choose multiple items by holding down the Control key while you select the items you want. You can select up to 100 items from the list. If you require more than 100 items, do several reports with different selection lists, or click the **All** button.

4. Click the **OK** button.
   The Customer or Employee Record Selection dialog box closes and the Selection list box displays the items you selected from the dialog box.

### Create Report button

When all the data needed to create a report is provided in the other report controls, the Create Report button is available.

To create a report:

1. Click the **Create Report** button.
   This starts the report generation process. The Reporting animated icon appears, indicating that the report is running. The icon stops when the report is complete.

**Note:** You cannot close the application while it is running. If you need to quit the application while a report is running, you can do it from the Close Programs dialog box in the Windows Task Manager. Refer to Windows Help for information on how to force programs to quit.

2. After the report is complete, it appears in the Report Viewing area below the Report controls. The Create Report button is unavailable again, indicating that the report is created. The Report controls are disabled and the keyboard functions only in the Report Viewing area. You can re-access the Report controls by pressing the Tab key.

### Viewing the report you generated

After a report is created, the Page> and Page< buttons are available. The Page> button shows the next available page of the report, if there is one, in the report view. The Page< button shows the previous page of the report, if there is one.

The page number of the current page appears in the bottom right corner of each page of the report.

You can also change the displayed page from the keyboard.

To change the displayed page from the keyboard:

1. Ensure the keyboard is active in the Report Display area, in the lower half of the Enterprise Edge Attendant Console Reports window. This is set automatically after creating report, but can also be done by pressing the **Tab** key to move through the Report settings.

2. Press **Ctrl** + **Page Up** to view the previous page, or **Ctrl** + **Page Down** to view the next page.

## Printing a report

When a report is in the Report Viewing area, the Print button becomes available.

To print a report:

1. Click the **Print** button.
   The report prints to the default printer. You can change default printer from the Printers folder. Access the Printers folder from the Windows Start menu or Control Panel. Refer to Enterprise Edge Attendant Console Help for further information.

2. Choose the pages and number of copies of the report to print.

3. Click the **OK** button and the report prints
   or
   click the **Cancel** button to cancel printing the report.

**Note:** If you change a Report Parameter in one of the Report Controls, the Create Report button is available and the Print button is unavailable. Do not change any Report Parameters before you print the report. If you change a Report Parameter, you must regenerate the report before you can print it.

# Glossary

**Assistant attendant**

The assistant attendant is the telephone attendant who provides call coverage for specific employees.

**Backup attendant**

The Backup attendant receives calls when the main attendant is not available. The main attendant uses the Out button on the Attendant main window to direct calls to the backup attendant.

**BLF (Busy Lamp Field)**

Busy Lamp Field is one of the Directory list tab views. It displays the phone status and extensions of employees.

**CF**

Call Forward.

**Caller ID**

Caller ID, known as CLID or Calling Line Identification, is provided by your telephone company. If your company subscribes to Caller ID, the caller name and number are displayed on incoming calls.

**CO**

Central Office.

**CTA - Computer Telephony Adapter**

A CTA is the hardware device used to connect a PC to the Enterprise Edge server, and includes the CTA 100, an external device, and the CTA 150i, which is installed in a PC hard drive.

**Destination extension**

The destination extension is the person’s extension to which a caller (or attendant) attempts to connect.

**DND**

Do not disturb.

**DTMF - Dual Tone Multi Frequency**

DTMF is the sound emitted when telephone buttons are pressed.

**Enterprise Edge Attendant Console**

Enterprise Edge Attendant Console is a Windows-based software product that provides call management and call activity reporting capability to a business.

#### Enterprise Edge server

The telephone system that Enterprise Edge Attendant Console works with.

#### External call

An external call is a call that originates from outside your company's voice message mailbox system.

#### Hookflash

This is the signal that occurs when a telephone goes on-hook followed by off-hook.

#### Hunt Group

A Hunt Group is a group of telephones that can be called by a single number. Hunt Groups are configured in your Enterprise Edge server.

#### ID

Identification.

#### Internal call

An internal call is a call, such as a call from another employee's extension, that originates from your company's Enterprise Edge server.

#### LAN

Local area network.

#### Main attendant

A main attendant is the telephone attendant who is primarily responsible for managing a company's incoming calls. The main attendant can have other attendants.

#### Networked model

In a networked model the Enterprise Edge Attendant Console main attendant's PC is connected to one or more additional attendant PCs through a network.

#### Overflow attendant

The overflow attendant receives incoming calls when there are more than six active calls at the main attendant's PC.

#### PC

Personal Computer.

#### Server component

The Enterprise Edge Attendant Console Enterprise Edge server program supports the Attendant component residing in the PC.

#### Shared system

In an Enterprise Edge Attendant Console shared system the Enterprise Edge server is shared by two or more companies.

**Stand-alone model**

A stand-alone model is a Enterprise Edge Attendant Console system in which one attendant manages a business's incoming calls. There are no assistant attendants, backup attendants or overflow attendants in a stand-alone model.

**Target extension**

A target extension is the extension number to which you are directing a call.

**VM**

Voice mail or voice message mailbox.

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